Standard - Nortel Networks Confidential

MCP 3.0 Standard (04.02)
Part No. NN10039-113
July 2004

Personal Agent User Guide

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Contents

Welcome

The "*Personal Agent User Guide"* is is intended only to provide you with the instructions you need to get up and running with this product. This guide describes the Personal Agent, a feature-rich online user interface IP telephony solution. Using the Personal Agent, you can view, manage, and configure services to your personal preferences from any location with no software download.

Sections include:

- "Getting started with the Personal Agent" on page 1
- "Managing your preferences" on page 15
- "Creating and maintaining your directories" on page 45
- "Call logs" on page 77
- "Using click to call to make calls" on page 81
- "Using the Personal Agent Route Wizard" on page 87
- "Address Book Search Criteria" on page 111

Audience

This guide is intended for subscribers of the Personal Agent services and features. We recommend that you keep your Personal Agent open when you follow the steps described in the "*Personal Agent User Guide"*.

Screen captures in the "*Personal Agent User Guide"* documentation show Internet Explorer as the default browser. However, if you are using another browser (for example Netscape), your screen may look slightly different.

Text conventions

This guide uses the following text conventions:

bold text	indicates the command key or link you need to press or click. Examples: Press **Ok**, Click **Help**
italic text	Indicates new terms, document titles.

Acronyms

This guide uses the following acronyms:

IP	Internet Protocol
PA	Personal Agent
PNG	portable network graphic
URL	universal resource locator (internet address)

Related publications

Other related publications related to the Personal Agent:

- *Multimedia Web Client User Guide (Part No. NN10040-112)*
- *Multimedia PC Client User Guide (Part No. NN10041-112)*
- *i2004 Internet Telephone User Guide (Part No. NN10042-113)*
- *i2002 Internet Telephone User Guide (Part No. NN10319-111)*
- *Assistant Console and Assisted Support Getting Started Guide (Part No. NN10393-112)*

How to get help

For service issues, please contact your local support or Information Services team.

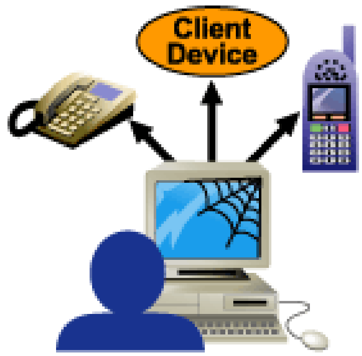
Chapter 1 Getting started with the Personal Agent

This section describes how to get started with The Personal Agent.

Topics include:

What is the Personal Agent?

The Personal Agent is a powerful tool that allows you to more effectively manage your services and communication preferences on your system. The Personal Agent is your own communications concierge, ensuring that your calls are delivered wherever, and whenever, you would like.



Personal Agent services and features

The Personal Agent solves the problem of having a different contact number for your office phone, home phone, mobile phone, and other communications devices. Using the Personal Agent, you can direct incoming calls to ring all of these devices at the same time, or in a sequence.

Personal Agent features allow you to:

- define how your incoming calls will be treated
- view and customize your personal information and services (including viewing the presence of another user in your network)
- manage, track, and maintain key contact information
- establish a call between you and another contact
- start the Multimedia Web Client from the Personal Agent

Before you begin

You need the following items to start using the Personal Agent:

- URL to access the Personal Agent
- User name and password for login (provided by your system administrator)

- PC configured with the required minimum software and hardware (See "Minimum hardware and software requirements" on page 3.)
- Internet access and a connection that meets the minimum transmission speed requirements

Minimum hardware and software requirements

- 200 MHz Pentium class or equivalent processor
- No additional free RAM is required. (The minimum memory requirements of your browser must be met. See your browser documentation for more information.)
- No additional hard drive space is required. (Local caching of web pages is performed by your web browser. See your browser documentation for information on the minimum disk space requirements.)
- Mouse (optional)
- 640x480 @8bpp (256 colors) VGA graphics card
- Microsoft Windows* 98 Second Edition (SE), Windows* Millennium Edition (Me), Windows 2000, Windows XP*, or Windows NT* 4.x with Service Pack 5 (SP5)
- 28.8Kbps modem
- Netscape Communicator* 7.0 or Internet Explorer* 6.0
- Cookies and javascript enabled

Recommended hardware and software requirements

- 300MHz (or higher) Pentium class or equivalent processor
- No additional free RAM is required. (The minimum memory requirements of your browser must be met. See your browser documentation for more information.)
- No additional hard drive space is required. (Local caching of web pages is performed by your web browser. See your browser documentation for more information on the minimum disk space requirements.)
- Mouse (required)
- 800x600 or higher @16bpp (65,536 colors) VGA or better video graphics card
- Microsoft Windows 98 Second Edition (SE), Windows 2000, Windows XP, or Windows NT 4.x with Service Pack 5 (SP5)

- 56Kbps modem or other high speed connection (For example, cable modem, DSL modem, 10baseT ethernet, and so forth)
- Netscape Communicator 7.1 and above, or Internet Explorer 6.0 and above
- Cookies and javascript enabled

Useful terms to know

The Personal Agent uses some terms that may be new to you. Take a moment to read through the explanations to familiarize yourself with the following terms.

Service package

Your service provider or system administrator assigns a service package with pre-defined features and options for you. Some features are only available to you if they are listed in your service package. For example, your service package defines how many entries in the list of Friends you can have, how many callers you can have join in on an audio conference, and whether you have voice mail enabled.

Address

When a procedure instructs you to enter an address it means entering either a telephone number or a SIP address. A SIP address is a unique identifier of users on the IP network. It has the same format as an email address, for example, jdoe@lab1.org, but it is not an email address. The network can identify where you are and route your calls by tracking your SIP address when you sign in to any Multimedia PC Client, Multimedia Web Client, or i2002 or i2004 Internet Telephone.

In order to make it easier to place calls, you can store addresses (SIP addresses or telephone numbers) in your personal address book.

Click to call

The Click to Call feature allows you to initiate call from any device for example, a PSTN Phone or registered Multimedia Communication Portfolio (MCP) SIP client, to a specified number.

Global address book

Your global address book is a list of all registered users on your network. (This list is maintained by your service provider or system administrator.) Using the Personal Agent, you can search for a Username/UserID, Name, First name, Last name, or Phone number. You can initiate a call by clicking on an entry in your global address book.

Personal address book

Your personal address book is a key tool for managing addresses. You can save your addresses for quick call (Click to Call) access as well as organize addresses into groups. Your personal address book is synchronized across all your network access devices. If you make a change in your personal address book on the Personal Agent, the change automatically appears on your other network access devices (for example, your Multimedia PC Client, Multimedia Web Client, and/or your i2002 or i2004 Internet Telephone).

Friends

Within your personal address book, you can designate entries as Friends. People that you contact frequently are good candidates as Friends. If you have marked an address book entry as a Friend, then you can see the online presence status for that entry in the Multimedia PC Client, or Multimedia Web Client or i2004 or i2004 Internet Telephone.

Note: The ability to designate entries as Friends is a feature of the Presence service and is dependent upon your service package. If your service package does not support the Presence service, then you cannot designate entries as Friends.

Presence

- **Presence:** a service on the Multimedia PC Client, Multimedia Web Client, or i2002 or i2004 Internet Telephone that allows you to see the online status of other users on your network and also a way to alert others to your status.
- **Automatic presence**: a service on the Multimedia PC Client, Multimedia Web Client, or i2002 or i2004 Internet Telephone that allows you to set the system to automatically alert others when you are away from your PC or on the telephone.

Note: The ability to configure automatic presence notifications on the Personal Agent is dependent upon your service package. If your service package does not support automatic presence, then you will not be able to use the automatic presence feature.

- **Presence Indicators:** You can determine the status of anyone registered in the system by querying the Personal Agent's global address list. This feature is extremely helpful when sending instant messages or after unanswered calls. The Presence states include:

Presence Indicator	**Status**	**Description**
	Active available	The user is active on their computer. This is an auto presence enabled state and is shown on the user's behalf.
	Active on the phone	The user is active on a call on one of their clients. This is an auto presence enabled state and is shown on the user's behalf.
	Connected	The user is registered on the network.
	Connected inactive	The user has not used their computer for a period of time. The idle timer is able to be configured by the user under the **Preferences > Services > Auto Presence** option.

Presence Indicator	Status	Description
	Connected <user defined>	These are the connected default states (Away, Out to lunch, and Be right back) and any user defined connected states that identify that the user is registered, but not readily available.
	Unavailable	The user is registered in the network but is busy, or, the user is not registered on the network.
	Unknown	No Presence information available.

Accessing the Personal Agent for the first time

To access the Personal Agent for the first time

1. Start your Web browser.
2. Enter the Personal Agent URL (provided by your service provider or system administrator) in your Web browser.
3. Press **Enter**. The Personal Agent Login page appears.

Logging in to the Personal Agent

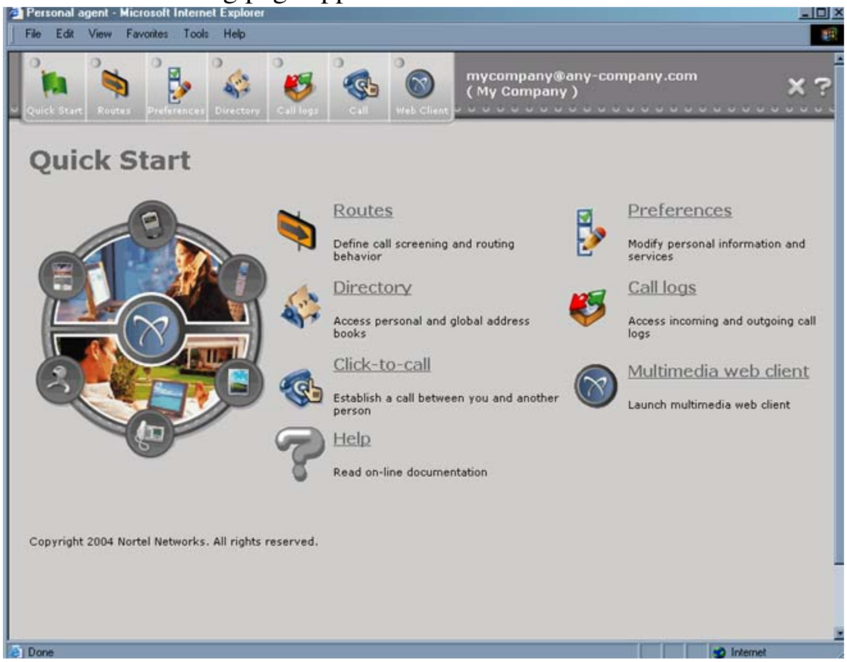
Before performing any of the functions available in the Personal Agent, you must first login.

Tip: Keep in mind that you can timeout due to inactivity.

To login to the Personal Agent

1 Enter your user name, domain name (for example: you@yourcompany.com), and password in the Personal Agent Login page.

2 Click **Login**. Once you are successfully logged in, the Personal Agent Quick Start landing page appears.



Understanding the Personal Agent interface

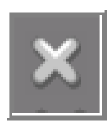
The Personal Agent Quick Start landing page is always your starting point to access all the services and features of the Personal Agent.

Navigating the Personal Agent Quick Start landing page

The icons and links on the Quick Start landing page and top navigation menu provide the interface to the Personal Agent services and features as described in the following table:

Service/Feature	Description
	Access to the Quick Start landing page, a road map to the Personal Agent services and features.
	Define how you want to manage your incoming calls by specifying the routing and screening of your calls. (The **Routes** icon will not display without the Advanced service package.)
	Manage your account and personal information.
	Create, view, and manage your personal address book. View your global address book.

Service/Feature	Description
	View your inbox and outbox list of calls. Click to call a contact in the list of save it to your personal address book. (The **Call logs** icon will not display without the Advanced service package.)
	Establish a call between you and another person.
	The Multimedia Web Client is an optional client that you can use for making calls. Refer to the *Multimedia Web Client User Guide* for additional requirements.

Exiting the Personal Agent 

To exit the Personal Agent click the **Logout** icon on the top right of any page you are currently working on.

Using the online Help 

There are several ways that you can access Personal Agent help:

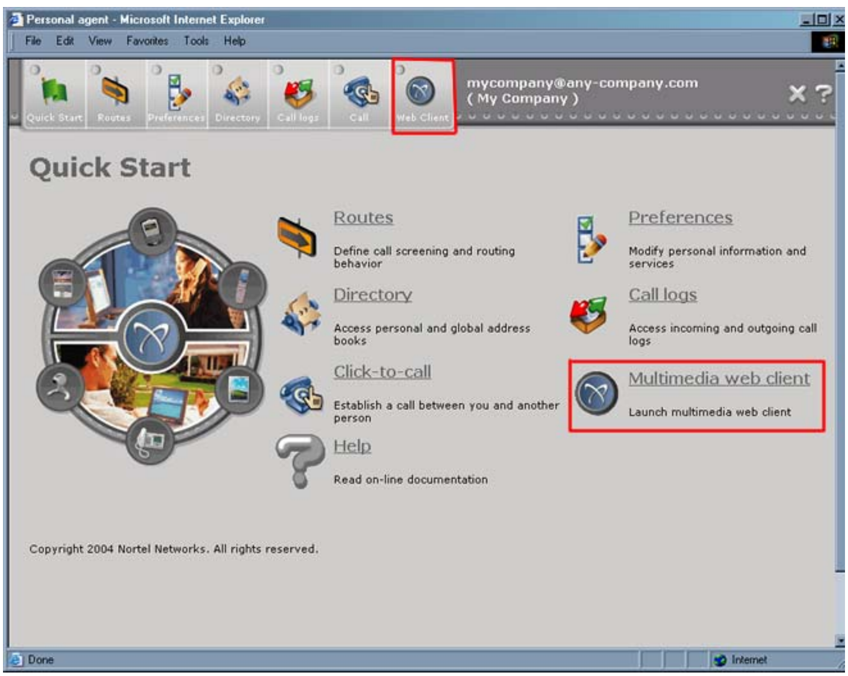
- online help - from any page, click the **Help** icon, on the top right of any page, to view a task-based help system. The online help provides:
  - — help pages containing forward and backward navigation icons

- procedures that help you use the Personal Agent
- hypertext links to all topics
- a Table of Contents with hypertext links
- an Index with hypertext links

- rollover help - help text with a description and possible values that appears when your mouse pointer moves over a form field or an icon.

Starting the Multimedia Web Client

To start the Multimedia Web Client from the Personal Agent click the **Multimedia Web Client** icon on the Quick Start landing page or from the top navigation menu.



Chapter 2
Managing your preferences

Topics in this section:

Tip: Click the **+** and **-** symbols to expand or collapse a menu item on the Preferences page.

Setting up your personal preferences

To set up or modify your personal preferences, click the **Preferences** icon on the Quick Start page or from the top navigation menu. Click the **Personal** submenu item. The following submenu items appear:

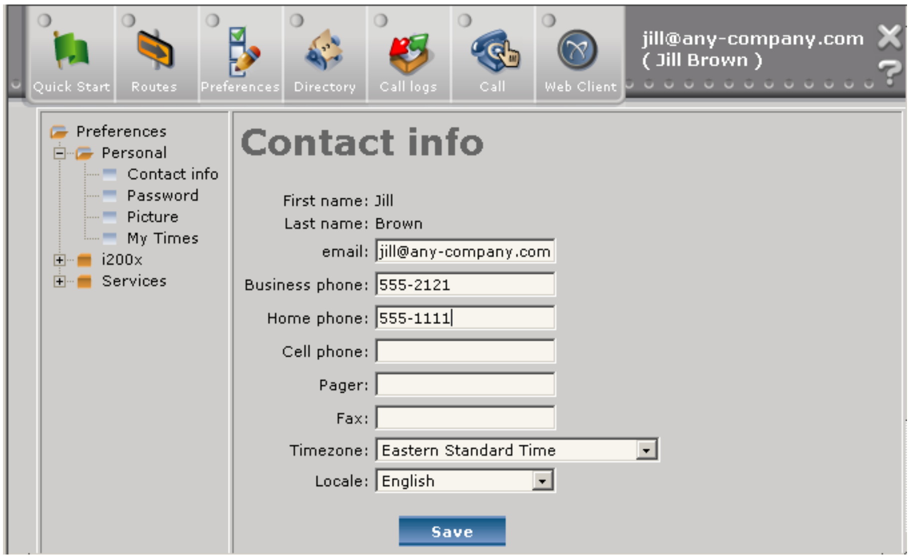
- Contact info
- Password
- Picture
- My Times

Tip: The information you enter in the **Contact info** and **My Times** submenu items is used when setting up routes for your incoming calls. See Chapter 6, “Using the Personal Agent Route Wizard for complete information on setting up routes.

Modifying your contact information

To modify your contact information

1 Click the **Preferences>Personal>Contact info** submenu item. The Contact info page appears, allowing you to view or update your contact information.



From this page, you can view your first name, last name, and alias as entered by your service provider or system administrator. You can enter or modify your email address, business, home, cell, pager, and fax phone numbers. You can also modify your timezone and locale.

Field	**Description**
First Name	Your first name as it appears to other users (viewable field only).
Last Name	Your last name as it appears to other users (viewable field only).
Alias	An alias (if provisioned) that associates a PSTN phone number to your username (viewable field only).
Email	Email address (for example tsmith@acme.com)
Business phone	Your business telephone number.
Home phone	Your home phone number.
Cell phone	Your cell phone number.
Pager	Your pager number.

Field	Description
Fax	Your FAX number.
Timezone	Your time zone in which your predefined My Times Call Screening times are enforced.
Locale	Your language and region, for display in different languages, if supported. (You will need to logout and login again for changes to take effect.)

2 Complete the fields on the page.

3 Click **Save**. The message “Personal information updated successfully” appears at the top of the Contact Info page indicating that your changes are applied.

Changing your password

When you change your password, your password changes across all client devices (Multimedia PC Client, Multimedia Web Client, Personal Agent, and the i2002 and i2004 Internet Telephones).

To change your password

1 Click the **Preferences>Personal>Password** submenu item. The password page appears.

2 Complete the required fields.

Field	Description
New Password	Your new password. **Note:** Consult your system administrator for password criteria.
Confirm Password	Confirmation of your new password.
Old Password	Your old password that you entered when you registered with the Personal Agent,

Tip: For security purposes, it is recommended that you change your password periodically.

3 Click **Save**. The message “Password updated successfully” appears at the top of the Password page indicating that your changes are applied.

Selecting a picture ID

You can add a picture to use as your picture caller ID in the Multimedia Web Client or the Multimedia PC Client. If you are replacing an existing picture ID then your new picture overwrites the old picture.

To add or modify a picture

1 Click the **Preferences>Personal>Picture** submenu item. The Picture page appears, allowing you to add, view, or update your picture caller ID picture.

The first time you access this page you will notice a shadow figure. This indicates that you do not have a picture in the database.

2 Enter the path and file name of the picture to use for your Picture Caller ID service on the Multimedia Web Client or Multimedia PC Client, or, click **Browse** and then select the picture file.

3 Preview your picture. You will notice the word “Preview” appears on your picture. The word “Preview” is removed once you save the picture.

Tip: Pictures greater than 160 x 120 pixels will be resized. The picture cannot be larger than 24KB. Use only PNG or JPG files.

4 To reset your picture from the preview picture to your current picture, click **Reset**.

5 Click **Save** to save the picture as your picture caller ID. The picture file you specify is sent to your service provider’s user database and displays on the Multimedia Web Client, Multimedia PC Client, and on the Picture page each time you use the Personal Agent. The picture will also display in the address book in "card view" mode. Click **Delete** to delete a picture.

Note: A picture caller ID displays when the contact has been added to the address book of the person being called.

Setting up My Times date and time ranges

If the Advanced screening parameter is enabled in your service package, you can use the My Times page to create, modify, copy, rename, or delete day and time ranges to use when setting up conditions to screen and route your incoming calls.

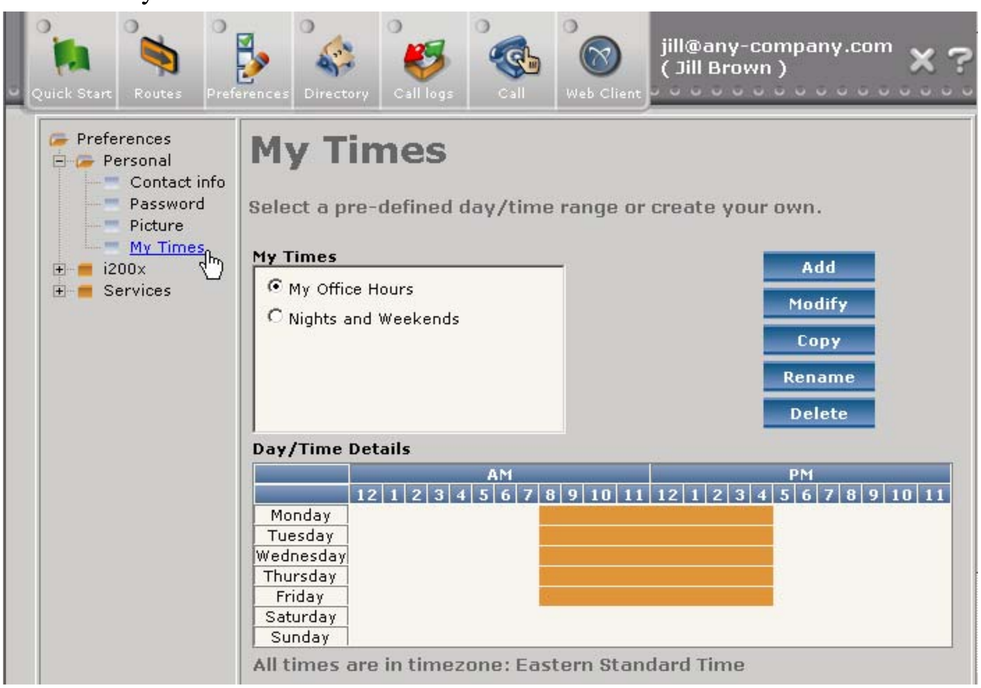
Adding a new day and time range

To add a new day and time range

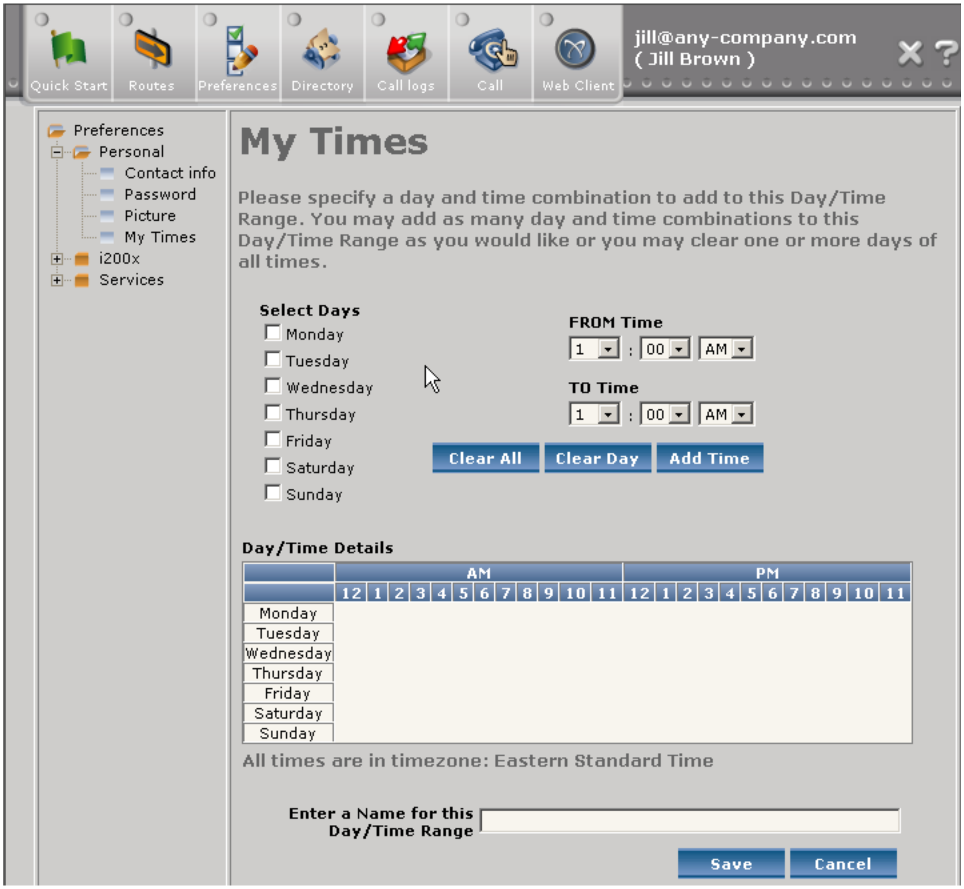
1 Click the **Preferences>Personal>My Times** submenu item. The My Times page appears.The first time you use the Personal Agent, you will see the following default day and time options to choose from in the My Times window:

- My Office Hours
- Nights and Weekends

2 Select a default option (for example, My Office Hours). A graphic display for the default time range of 8:00 AM to 5:00 PM, Monday - Friday, appears in the Day/Time Details window.



3 Click **Add**. A new My times page appears (without any Day/Time combinations selected) that allows you to add your desired days and times and create a new Day/Time range.



4 Select your Day/Time combinations.

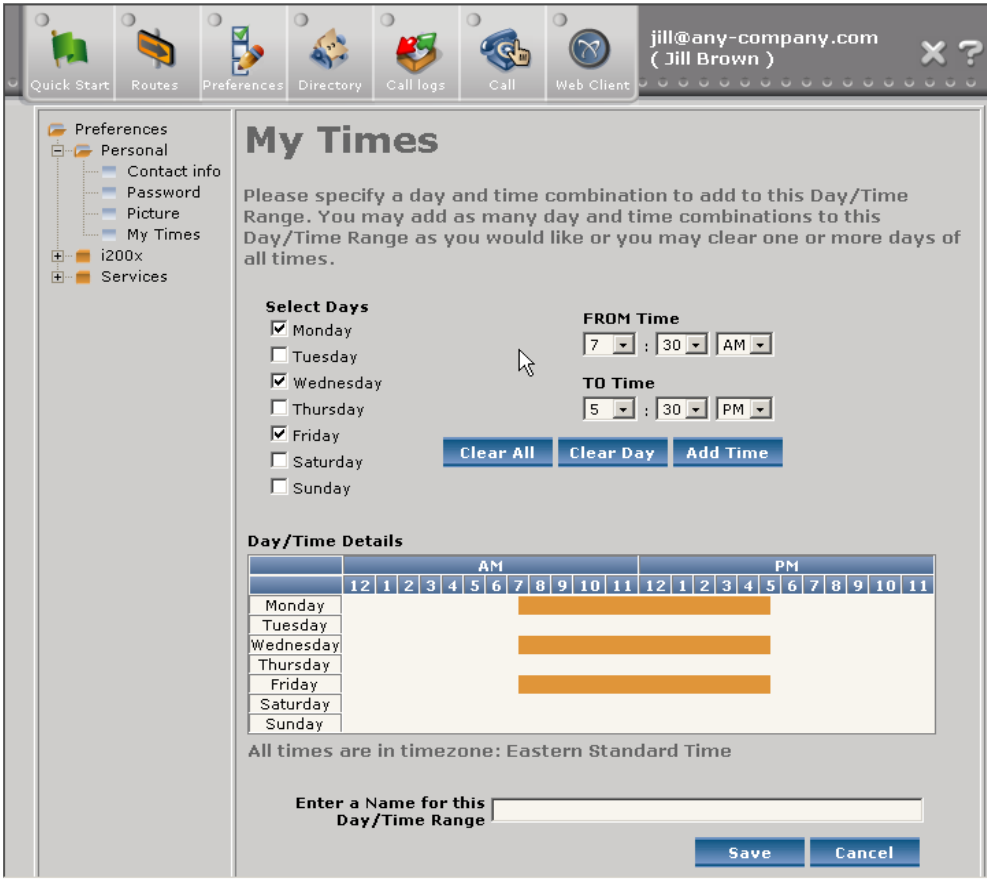
For example, if you work part time, you may want to add a Day/Time combination that will only apply on Monday's, Wednesday's and Friday's between the hours of 7:30 AM and 5:30 PM. To set up these hours

a Select Monday, Wednesday, Friday in the Select Days column.

b Select 7:30 AM in the From Time drop down lists.

c Select 5:30 PM in the To Time drop down lists.

d Click **Add Time**. The graphic display in the Day/Time Details window is updated with your selected days and times.



5 To add more than one Day/Time combination to apply to the Day/Time range.

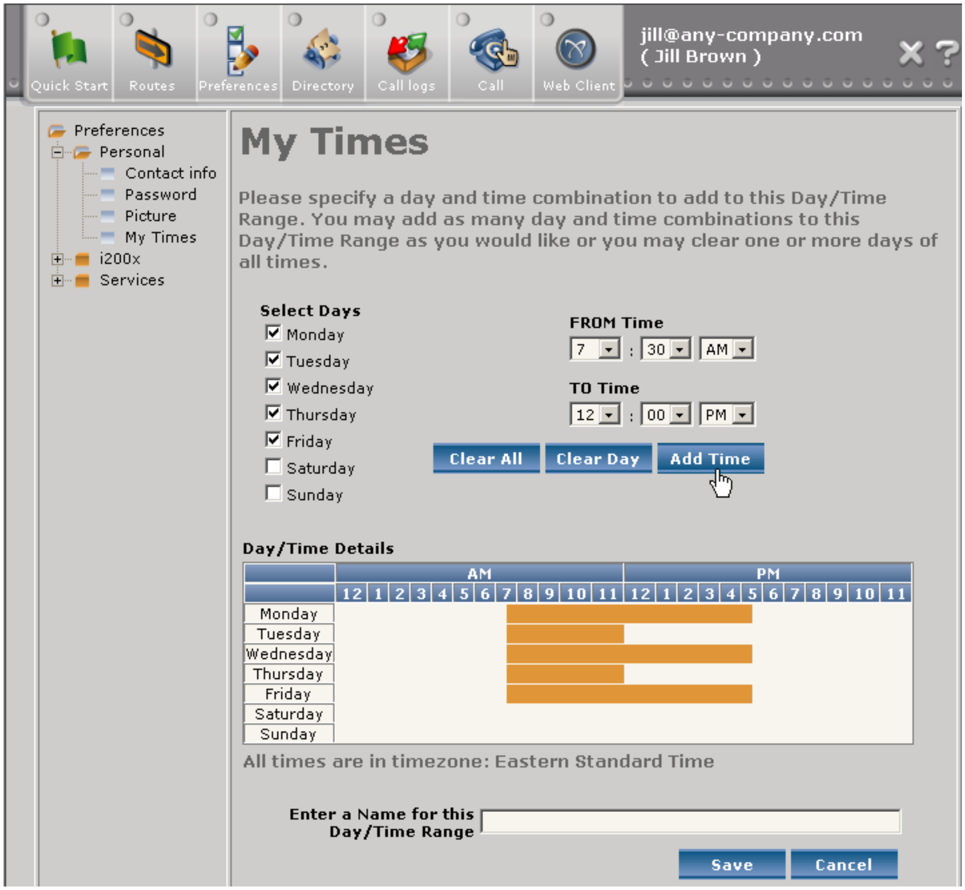
For example, in addition to working part time on Monday's Wednesday's and Fridays, you may work half days on Tuesday's and Thursday's. To set up these hours

a Select Tuesday and Thursday in the Select Days column.

b Select 7:30 AM in the From Time drop down lists.

c Select 12:00 PM in the To Time drop down lists.

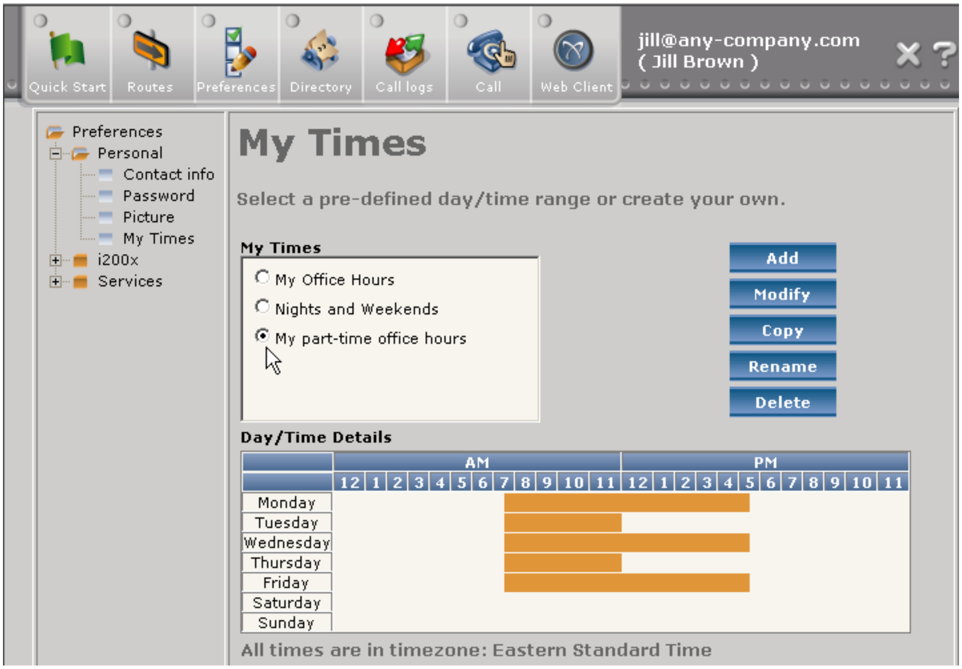
d Click **Add Time**. The graphic display in the Day/Time Details window is updated with your selected days and times.



Tip: To remove all Day/Time ranges for a selected day, check the day in the Select Days column and click **Clear Day**. To remove all Day/Time ranges for all days, click **Clear All**.

6 Enter a name for the Day/Time range in the text box provided.

7 Click **Save** to save your new Day/Time range and combinations, or **Cancel,** to return to the My Times page without creating a new range.The new range appears in the My Times window.



Modifying a day and time range

To modify an existing day and time range

1 Click the **Preferences>Personal>My Times** submenu item.The My Times page appears with Day/Times options in the My Times window.

2 Click an option in the My Times window (for example, My Office Hours). A graphic display for the day and time range appears in the Day/Time Details window.

3 Click **Modify**. Enter your changes to the days and time ranges on the My Times page. Click **Add Time.** Your changes appear in the Day/Time Details window.

4 Click **Save** to save your Day/Time changes, or **Cancel** to return to the My Times page.

Copying a day and time range

To copy a Day/Time range

1. Click the **Preferences>Personal>My Times** submenu item. The My Times page appears. Select the option you want to copy in the My Times window.
2. Click **Copy**. The My Times copy page appears. Enter a name for the new Day/Time Range.
3. Click **Save** to save your changes, or **Cancel,** to return to the My Times page. The My Times page appears with the new Day/Time range in the Day/Time Details window.

Renaming a day and time range

To rename a day and time range

1. Click the **Preferences>Personal>My Times** submenu item. The My Times page appears.
2. Select an option in the My Times window.
3. Click **Rename**. The My Times rename window appears.
4. Enter a new name for the Day/Time range.
5. Click **Save**, or **Cancel,** to return to the My Times page.

Deleting a day and time range

To delete a day and time range

1. Click the **Preferences>Personal>My Times** submenu item. The My Times page appears. Select an option from the My Times window.
2. Click **Delete**.
3. At the confirmation box, click **Ok** to confirm that you want to delete the My Times option, or **Cancel** to return to the My Times page.

Modifying your i2002 and i2004 Internet Telephone settings

To set up or modify your i2002 and i2004 Internet Telephone preferences, click the **Preferences** icon on the Quick Start page or from the top navigation menu. Click the **i200x** menu item. The following submenu items appear:

- **Subjects**
- **Reasons**
- **Personalized presence**
- **Logout**

Creating a subject list for your i2002 and i2004 Internet Telephone calls

On the i2002 and i2004 Internet Telephone, you can select from a list of subjects when you place an outgoing call. The subject displays on the i2002 and i2004 Internet Telephone (as well as other registered SIP clients) of the person you are calling to alert them as to why you are calling.

To create a new subject in the list

1 Click the **Preferences>i200x>Subjects** submenu item. The Subjects page appears.

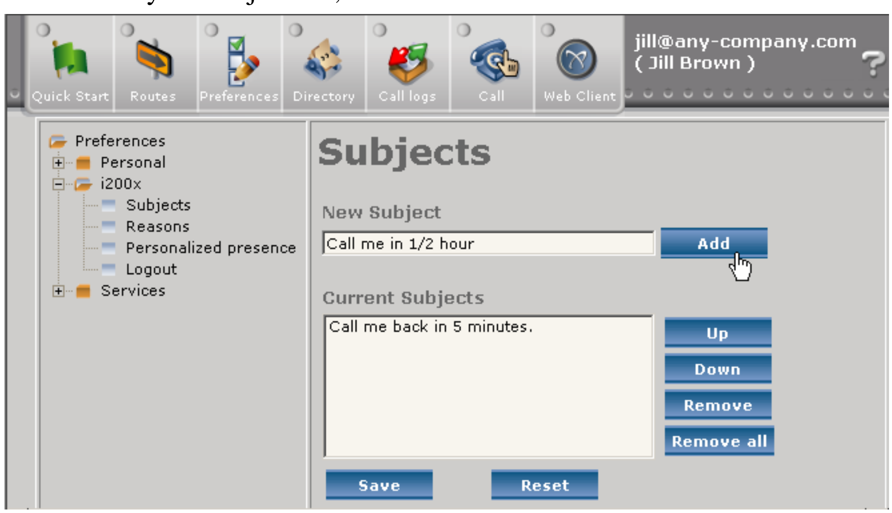
2 Enter the text of the subject in the New Subject field.

3 Click **Add**. The subject text appears in the Current Subjects window

a To add another subject, enter the text of the subject in the New Subject field.

b Click **Add**. The subject text appears in the Current Subjects window.

c To save your subject list, click **Save.**



4 To remove a subject, select the entry, and click **Remove**. To remove all subjects in the list you created, select all the entries, and click **Remove All**.

5 To save your subject list, click **Save**, or **Reset**, to clear your input on the Subjects form.

Changing the subject list order

To specify the order in which the subjects display on an i2002 and i2004 Internet Telephone

1 Click on a subject in the Current Subjects window.

2 Click **Up** or **Down** to change the order of the subject list.

3 To save your changes, click **Save**.

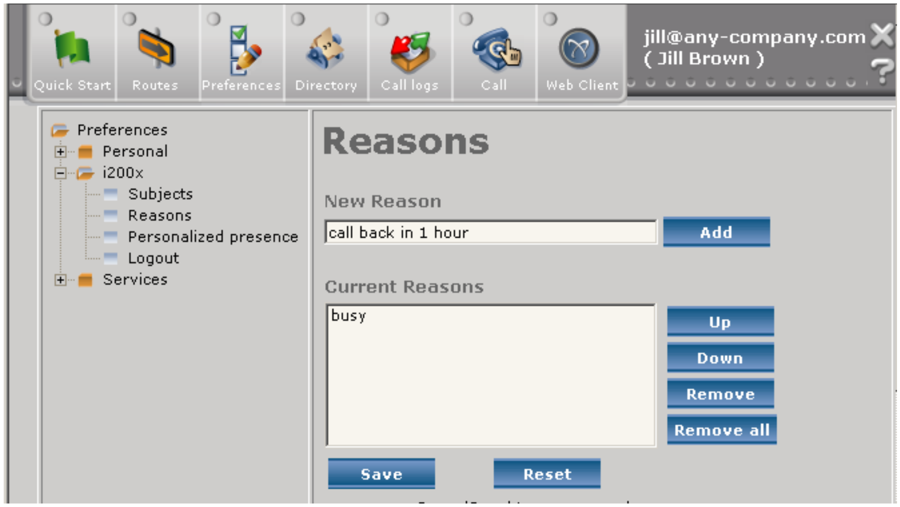
Specifying reject reasons

You can specify a reason or list of reasons to display on your i2002 and i2004 Internet Telephone.

To specify a new reject reason or a list of reasons for rejecting an incoming call

1 Click the **Preferences>i200x>Reasons** submenu item. The Reasons page appears.

2 Enter the text of the reason (for example, Busy right now or Try again later) in the New Reason field.



Tip: The reasons are displayed in the order that you enter them.

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3 Click **Add**. The reason text appears in the Current Reasons window.

- **a** To add another reject reason, enter the text of the reason in the New Reason field.
- **b** Click **Add**. The reason text appears in the Current Reasons window.

4 To save the reason, Click **Save**.

Or, click **Reset**, to clear your input and reset your reason list to the last saved settings. (To remove a reason, select the reason and click **Remove**, or **Remove All**, to remove all reasons.)

Tip: The reasons display on your i2002 and i2004 Internet Telephone in the same order they appear in the Current Reasons window.

Changing the order of the list of reasons

To reorder the list of reasons displayed on an i2002 and i2004 Internet Telephone

1. Click on a reason in the Current Reasons window.
2. Click **Up** or **Down** to reorder the reason for display on the i2002 and i2004 Internet Telephone.

Tip: The reasons display on your i2002 and i2004 Internet Telephone in the same order they appear in the Current Reasons window.

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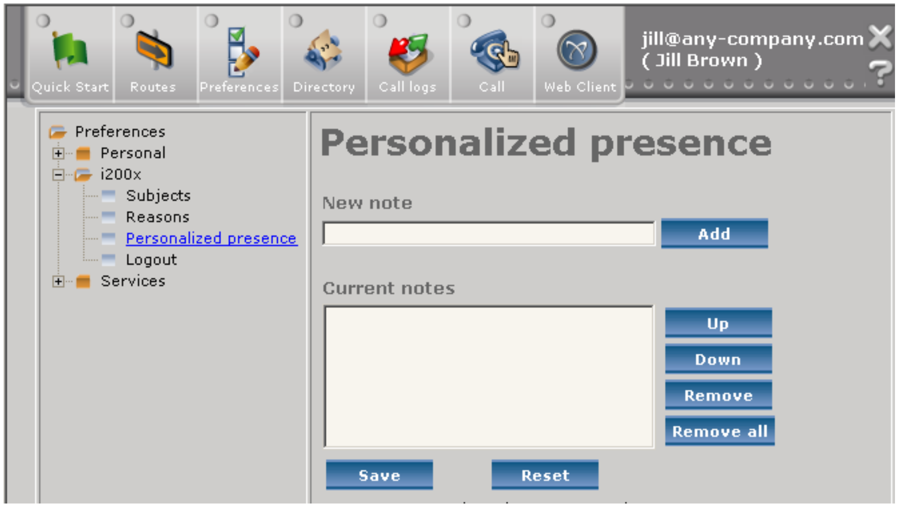
   a. To remove a reject reason from the list, highlight the entry in the Current Reasons list.
   b. Click **Remove** to remove the selected reason, or, click **Remove All**, to remove all reasons.

3. To save your changes, click **Save**.

Personalizing your presence

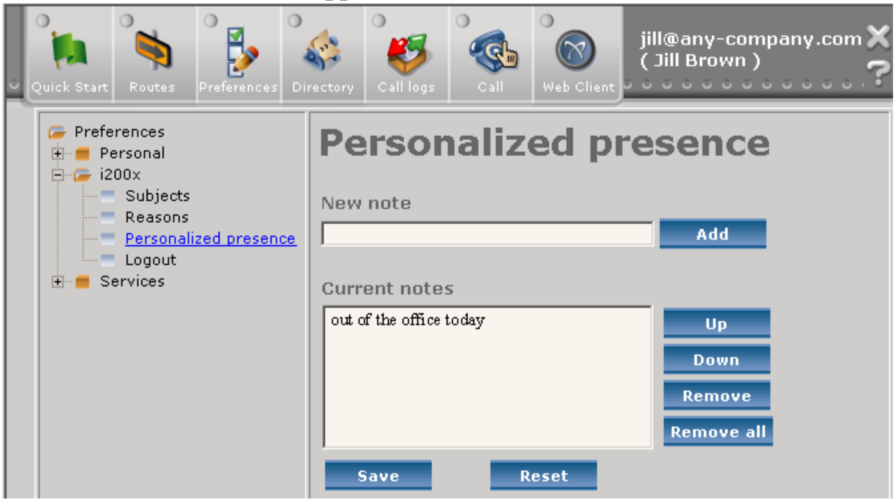
To customize a presence status note for display on the i2002 and i2004 Internet Telephone

1 Click the **Preferences>i200x>Presence>Personalized presence** submenu. The Personalized presence page appears.



2 Enter a note in the New Note text field to appear on your i2002 and i2004 Internet Telephone.

3 Click **Add**. The note text appears in the Current notes window.



a To add another note, enter the text of the note in the New Note field.

b Click **Add**. The note text appears in the Current Notes window.

c Click **Up** or **Down** to reorder the presence note for display on the i2002 and i2004 Internet Telephone.

4 To save the note, Click **Save**.

Or, click **Reset**, to clear your input and reset your note list to the last saved settings. (To remove a note, click **Remove**, or **Remove All**, to remove all notes.)

Checking i2002 and i2004 Internet Telephone settings

If you work in a number of locations and often log into several i2002 and i2004 Internet Telephones, you can use the **i200x** option to check your login status and log yourself out from an active phone.

To check the login status of an i2002 and i2004 Internet Telephone

1 Click the **Preferences>i200x>Logout** submenu item. The Logout page appears.

2 Look for the i2002 or i2004 Internet Telephone that you are logged into based on the Device Label, MAC address, or Users.

Tip: The **i200x** option lists a separate entry for each phone you are logged into.

3 Click the **Log Me Out** link, for the i2002 and i2004 Internet Telephone you want to log out of. Click **Ok** at the confirmation message.

Viewing and modifying your available services

To view or modify the list of services that you are currently subscribed to, click the **Preferences** icon on the Quick Start page or from the top navigation menu. Click the **Services** menu item. The following submenu items appear:

- Service package - the list of services assigned to you by your service provider or system administrator
- Presence- allows you to see the online status of other users on the network and also a way to let others know your status.
    - Watchers - list of users that are currently watching your presence information.
    - Banned watchers - list of users that you have blocked from subscribing to your presence information by selecting the "Ban" option button
    - Auto presence - settings to automatically alert others when you are away from your PC or on the telephone.
- Meet Me - provides you with your conferencing bridge information.

- Call Park - select whether or not parked calls are returned to you if they are not retrieved (auto-retrieve) and change the time setting that determine how long a parked call waits before it is returned.
- Calling Line ID Restriction - block your calling line ID information from transmitting when you make a call.

Tip: You may see other menu items depending on your Service Package. Please refer to the documentation for those services.

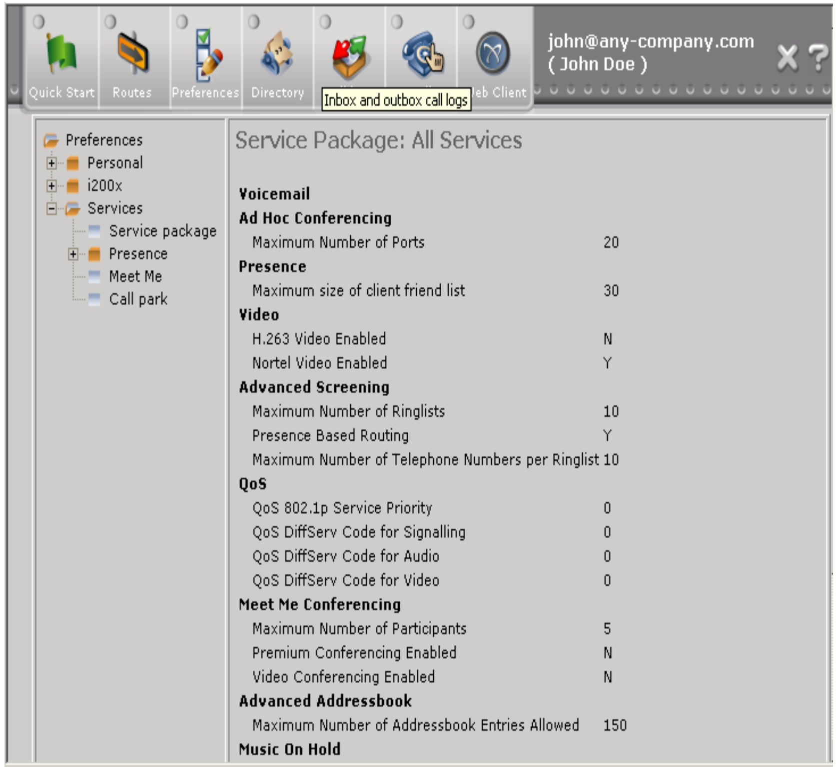
Viewing your service package information

Note: You do not have the ability to change any of the service package parameters that you view on the Service Package page. Contact your system administrator to request any changes to your service packages.

To view the services enabled in your service package

1 Click the **Preferences>Services>Service package** submenu item. The Service Package page appears, displaying the name of the service package

and the services packages assigned to you. The lists of features available will vary with each user based on the "Service Package" available to them.



2 View the list of services assigned to you.

➡ **Note:** The following table lists all the services available, however, your subscriber or system administrator may not have all Service Package Options therefore you may not be assigned some of the services or parameters listed.

If this Service Package Option is enabled...	**Then you have the ability to...**
Voice mail	receive and retrieve your voicemail and also receive notification of waiting messages. For information on retrieving voice mail refer to the *Multimedia PC Client User Guide*, *i2002 Internet Telephone User Guide, i2004 Internet Telephone User Guide* and the *Multimedia Web Client User Guide*.
Ad hoc conferencing	join, or conference, multiple users together in a call.
Presence	• view the online status of other users and allow others to monitor your status by indicating when your PC is inactive or when you are on the phone. • designate an address book contact as a Friend in order to see that person’s presence. The amount of friends is determined by the service provider. • prohibit a contact in your network from viewing your online presence status.
Video	receive and transmit video calls.
Advanced screening	defines routes that affect how your calls and instant messages are received. A Route allows you to specify locations that will ring simultaneously or sequentially when you receive a call. A Route can be defined to only affect specific calls and/or Instant Messages based on a set of conditions selected by the user, for example: the time of day you receive the call and/or who is calling.
QoS	set the following quality of service parameters: • QoS DiffServ code for signalling • QoS DiffServ code for audio • QoS DiffServ code for video • QoS 802.1p service priority
Converged Desktop	use your Multimedia PC Client to access multimedia services, while using your existing telephony system for voice, for detailed information refer to the ***MCS 5100*** or ***MCS 5200 Feature Description Guide***
SimRing	simotainously rings mutiple end points as designated by the user, for more detailed information refer to the "***MCS 5100*** or ***5200 Feature Description Guide***"
Personal Agent Intelligent Networking (PA IN)	A user of the Personal Agent-driven Converged desktop service can access certain features and perform the certain tasks through the Multimedia PC Client. For more detailed information on this features refer to **MCS 5100** or **5200 Feature Description Guide**

If this Service Package Option is enabled...	**Then you have the ability to...**
Device Access Restrictions	have full or restricted access to i2002 and i2004 Internet Telephone functionality.
Hot Line	call a pre-determined destination by going off hook on the relevant line key. Used in conjunction with the Device Access Restriction service package option.
Meet me conferencing	chair an audio conference by sending out a dial-in number and Personal Identification Number (PIN) for a conference bridge.
Advanced Addressbook	has greater than 10 contacts (default), the maximum number of contacts is determined by the service provider
Assistant Support Assistant Console	to act as an assistant for another person in order to answer and route their calls. Refer to the *"**Assistant Console and Assisted Support Getting Started Guide**"*.
Music On Hold	provide music to callers that you put on hold.
Call Park	park a call so that another user can pick it up
Calling Line ID Restriction	block your calling line ID information from appearing on the display of other telephones.
Call Waiting Disable	disables the Call Waiting feature
Net6 Support	The Net 6 support activity allows i2004 Internet Telephones to display Web text. It allows them to connect to the Net 6 server to display information from the Web. It also allows a user to perform searches of a corporate directory. Refer to the "***Feature Description Guide***" and the "***i2004 Internet Telephone User Guide***" for more detailed information on this feature.
Network Call Logs	to view the number of inbox and outbox call logs allowed
IM Chatroom	send IMs to multiple users (for Multimedia PC Client and Multimedia Web Client)
Unified Communications	set up mailbox greetings, change your PIN, set up email preference, etc. Note: This feature must be enabled in your service package. Refer to the Unified Communications Quick Reference for procedures.

Viewing your Watchers List

To see a list of people who have subscribed to your presence information

1 Click the **Preferences>Services>Presence>Watchers** submenu item. The Watchers List page appears.

The list shows only the active usernames watching your presence not all users registered to your presence. The date when an active watcher subscribed to your presence information is also displayed. To ban an active watcher from seeing your presence information

a Click the checkbox beside the watcher's username.

b Click the Ban watcher's icon. The Banned watchers list appears with the new banned watcher's username.

Setting up a Banned watcher's list

You want to ban someone from subscribing to your presence information in the future. Use the **Banned watchers** menu option to restrict access to other users who do not currently appear in your watcher's list.

To ban someone from viewing your presence information

1 Click the **Preferences>Services>Presence>Watch List** submenu item. The Watch List page appears.

2 Enter the SIP address of the person you want to ban.

3 Click **Save**. The person you added to the Watch List can still call you, but they can no longer see your online status. The name now appears in a list of banned users.

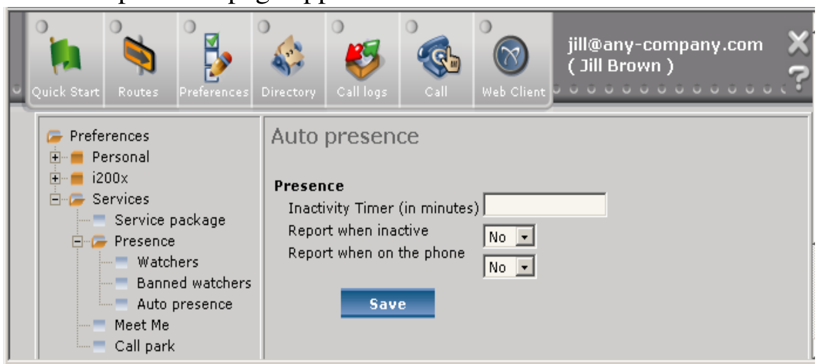
4 To delete a user from your Watch List, click the link, **Delete**, next to Banned User. Click **Ok** at the confirmation message. The party is removed from the ban list.

Modifying your Automatic Presence service

If you have the Automatic Presence service enabled in your service package, you can automatically let other users in your network know whether you are away from your PC or on the phone.

To modify your Auto presence options

1 Click the **Preferences>Services>Presence>Auto presence** submenu item. The Auto presence page appears.



2 Select the **Report when inactive** option, and enter a time value in the range of 10 to 600 minutes into the **Inactivity Timer (in minutes)** field. This value is the number of minutes that must elapse before your status is reported as inactive. People who have subscribed to your presence will be alerted to your presence status after the elapsed time.

Note: The Inactivity Timer (in minutes) option only applies to the Multimedia PC Client and the Multimedia Web Client. This option does not apply to the i2002 and i2004 Internet Telephone.

3 Select the **Report when on the phone** option to allow people subscribed to your presence to receive an “On the Phone” message that displays when you are connected on a call. This option applies to all the clients: Multimedia PC Client, the Multimedia Web Client, and the i2002 and i2004 Internet Telephone.

4 Click **Save**. Any changes to your service package are reflected the next time you log in.

Viewing and modifying your Meet me conferencing details

The Meet me audio conferencing service allows you to have a personal conference bridge, available 24 hours a day. Usage of the bridge is strictly enforced through a PIN access. Participants dialing into the bridge are greeted and prompted to enter in an Access Code that uniquely identifies a personal bridge. Only you, as the chairperson (the person who owns the bridge) can open the bridge and allow all participants to join.

To view the details of your bridge

1 Click the **Preferences>Services>Meet Me** submenu option. The Meet Me page appears.

2 View the specific details of your conference information

— Dial-In Number

— Access Code

Note: Contact your service provider or system administrator to request any changes to the conference phone number(s) or conference access code.

— Chairperson PIN. To change the Chairperson PIN, enter a number between 4 and 10 digits long.

— A checkbox to indicate whether or not the conference will end when you disconnect from the call.

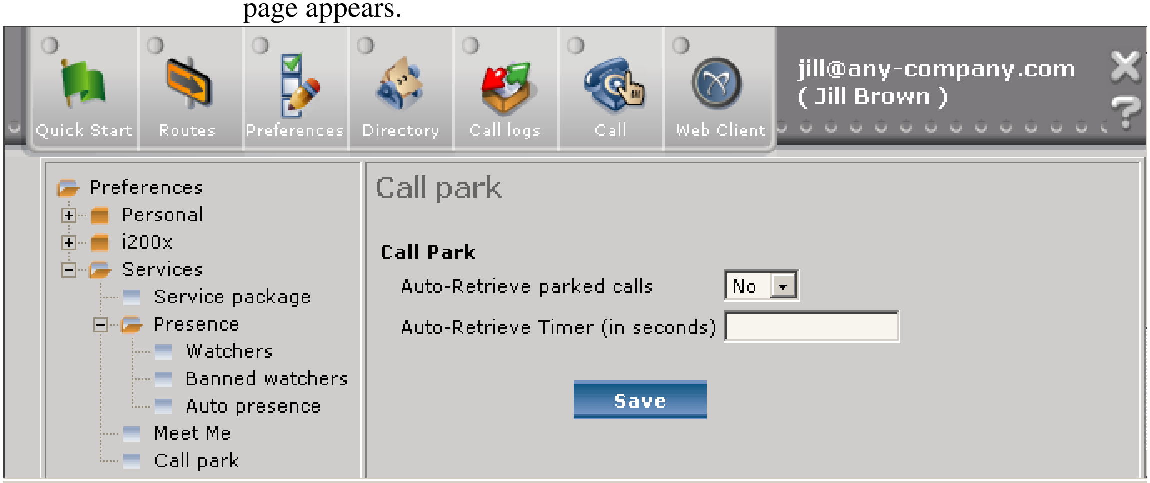
3 Click **Save** to save your changes. If you make changes and decide not to save them, click **Reset**. When you do, the page is refreshed to the original information.

Modifying your call park

Call park allows you to place a call on hold so that someone else can retrieve it. You can have the call returned to you if it is not picked up after a specified amount of time. For information on how to use the call park feature, refer to the user guide for your device. This service must be enabled in your service package.

To change your call park settings

1 Click the **Preferences>Services>Call park** submenu option. The Call Park page appears.



2 Select **Yes** or **No** from the Auto-Retrieve parked calls drop down menu.

3 Enter the amount of time (in seconds) that must elapse before a call is auto retrieved. (Note: This step is not required if you chose not to auto retrieve calls in step 2.)

4 Click **Save**.

Setting Calling Line Identification

Calling Line Identification allows you to specify whether or not you want your name and number to display when you call someone. This service must be enabled in your service package.

To change your Calling Line ID Restriction setting

1 Click the **Preferences>Services>Call park** submenu option. The Call Park page appears.

2 Select **Yes** or **No** from the Calling Name/Number Privacy drop down menu.

Note: If you enable this service then your calling ID information displays as either "unknown" or "anonymous".

Chapter 3
Creating and maintaining your directories

The Directory icon (available from the Personal Agent Quick Start landing or top navigation menu) allows you to:

- create and maintain a personal address book of your personal contacts and groups of contacts.
- access a global address book of all users in your domain.
- call a contact from your personal or global address book.
- access details about a contact including their presence status on the system.

Topics in this section:

Understanding Personal Agent address books

The following address books are available in the Personal Agent:

- personal address book - contains contact information set up by you.

- global address book - contains contact information (maintained by your system administrator and for reference only) of all users in your domain.

Tip: Information in your personal and global address book can be used as a condition when defining a route to handle your incoming calls. For more information see Chapter 6, “Using the Personal Agent Route Wizard,” on page 87.

Using your personal address book

Your personal address book is a dynamic list of contacts and information that lists the nickname, first name, and last name of a contact in your personal address book. You can also view and define a group for the contact to belong to and whether or not to include the contact in your list of Friends.

Tip: Anytime you add a contact or make a change to a contact using the Personal Agent, your personal address book automatically updates and synchronizes with the Multimedia PC Client, Multimedia Web Client, i2002 and i2004 Internet Telephones which enables you to view your Friends on line from any of these devices.

Your personal address book has two viewing options for your contacts:

- List view -- a traditional “table-like” view
- Card view -- information as you would normally see on a business card (including a picture of the contact, if available)

Both the List view and Card view have the following icons available for working with your personal address book.

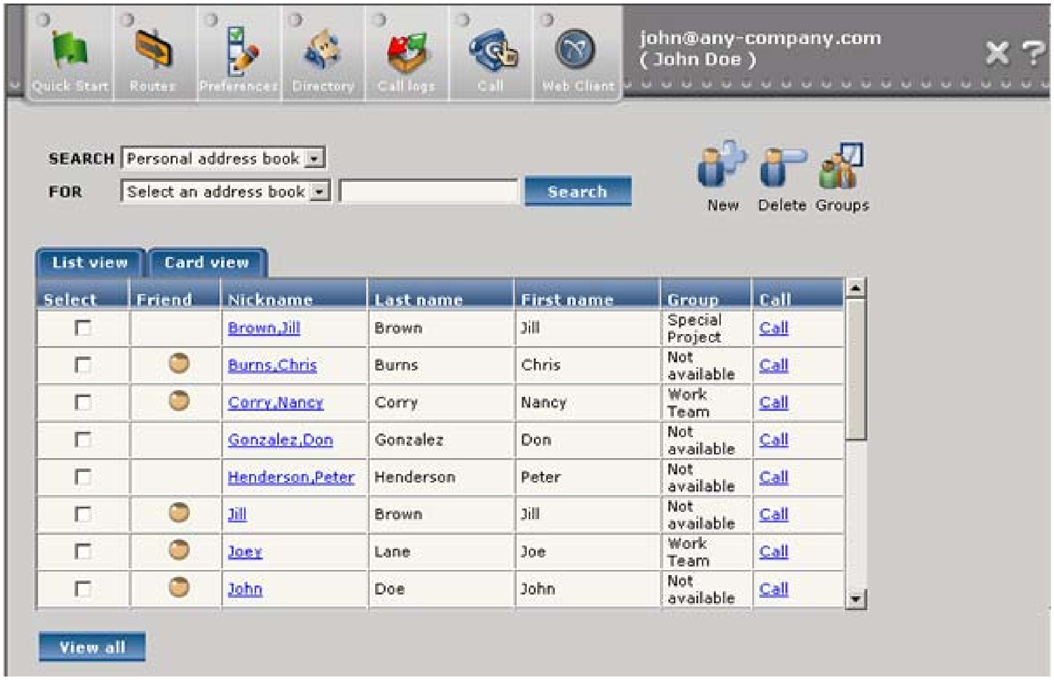
Click this icon...	**To...**
	Add a new contact to your personal address book
	Remove selected contacts from your personal address book.
	Create, rename, and delete contact groups in your personal address book.

Viewing your contacts in List view

To view your personal address book contacts in List view

Click the **Directory** icon from the Personal Agent Quick Start page or from the top navigation menu.

The **List View** tab is always the active view when you access your directory. Your personal address book appears in a list format, allowing you to scroll up and down to view all the contacts in the list.



Sorting your contacts

To sort your contacts, click a column name (for example, **Friend**, **Nickname**, **Last name**, **First name**, or **Group**). Click the column name again to sort in reverse.

Searching for a contact

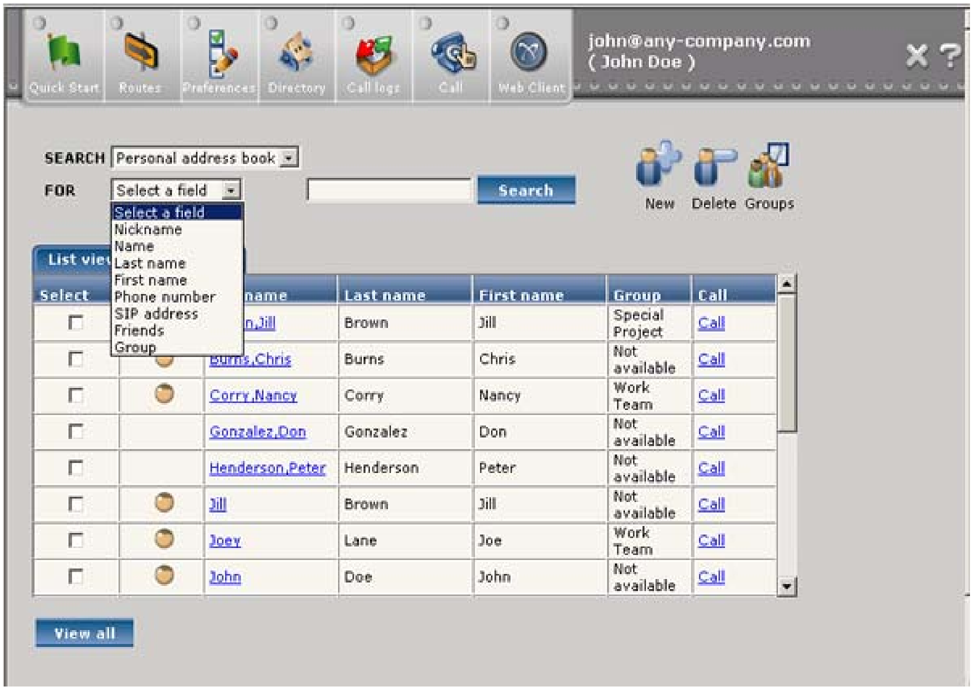
To search for a contact

1 Select Personal address book from the drop down list next to the **SEARCH** field.

2 Select a field to search on as described in the following table

Field	Search criteria
Nickname	An alternate name assigned to a subscriber. For example, you may assign the nickname “manager” for the person you work for.
Name	• First name and last name of the contact. For example, searching for the contact with the Name of Smith displays contacts with the first name Smith and contacts with the last name Smith. • Both first and last name of the contact. For example, the string John Smith returns contacts with the first name John and the last name Smith.The search string Smith, John, also returns the same contacts. • Name matching continuation. For example, entering a **y** returns all contacts starting with the letter **Y**.
Last name	Last name of the contact.
First name	First name of the contact.
Phone number	Telephone number of the contact.
SIP address	The SIP address of the contact on the IP network. It has the same format as an email address, for example, jdoe@lab1.org, but it is not an email address.
Friends	Nickname, first name or last name of the contact.
Group	Group name that the contact is a member of. For example, searching for Work returns all contacts that are members of that group.

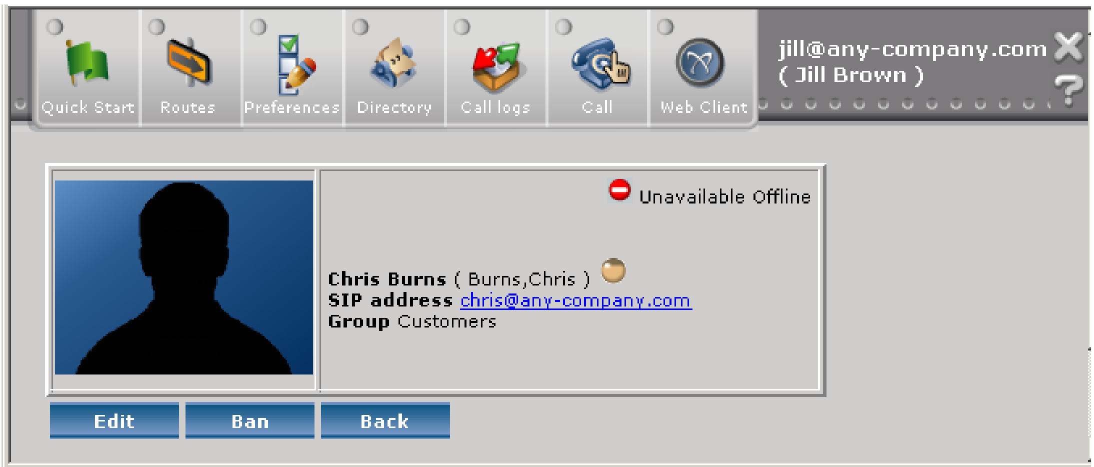
3 Enter a search string in the field provided and click **Search.**



Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n will return all contacts named John, Jon, Jen etc. Use quotation marks "," before and after a search string to specify an exact match. For a complete list of the search criteria refer to Appendix A, “Address Book Search Criteria,” on page 111.

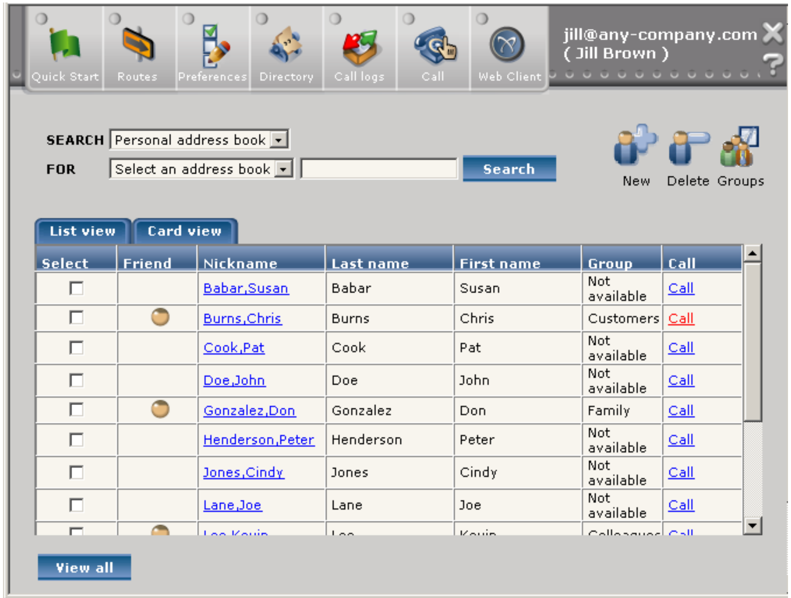
Viewing details about a contact

To view details about a contact, click a link in the **Nickname** column. A page appears listing details about the contact, including an icon that indicates their presence status on the network. You can click the "Back" button to return to the contact list.

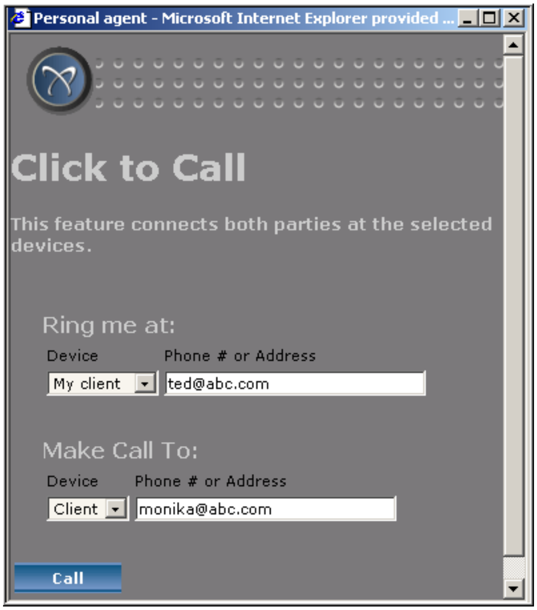


Initiating a call to a personal address book contact

To call a contact, click the **Call** link in the **Call** column to initiate a call to the contact in your personal address book.



The Click to Call page appears. See Chapter 5, “Using click to call to make calls,” on page 81, for complete information on using click to call.



Viewing your contacts

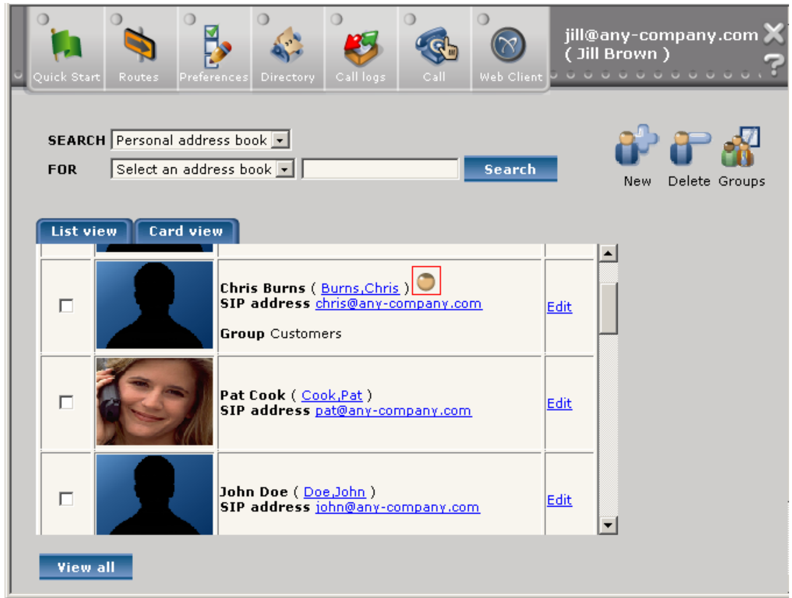
To expand the list of contacts to display all the contacts in your personal address book, click **View All**.

Viewing your contacts in Card view

To view your personal address book contacts in Card view

1 Click the **Directory** icon from the Personal Agent Quick Start page or from the top navigation menu.

2 Select the **Card View** tab. Your personal address book appears in a Card view. Scroll up and down to view all the contacts in the Card view.



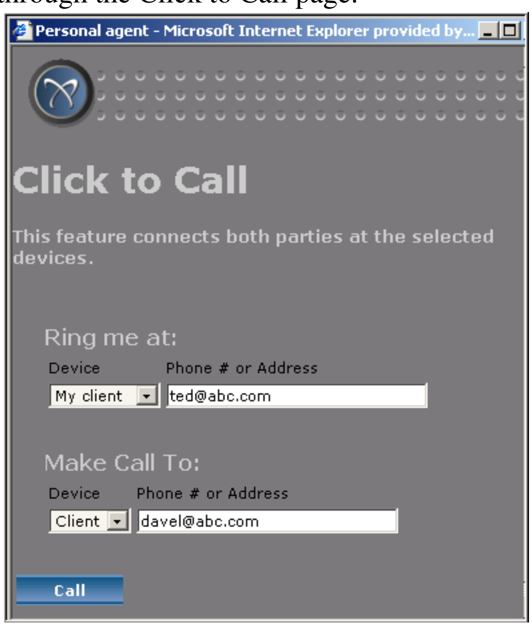
Tip: A shadow figure in the Picture column means that there is no picture ID available for the contact.

Viewing details about a contact

To view details, or initiate a call to a contact, click the following links in the **Details** column:

- **Name** - click to edit contact details. The contact details page appears and includes details such as the presence status of the contact on the network. Click **Edit** to edit contact details, or **Back,** to return to the list of contacts in Card view.

- **SIP address**, **Business phone**, **Home phone**, **Mobile** - click to initiate a call through the Click to Call page.



See Chapter 5, “Using click to call to make calls,” on page 81, for complete information on using click to call.

Managing your contacts in your personal address book

Your personal address book helps you manage, track, and access information about all of your key contacts.

Adding a contact to your personal address book

Note: The maximum number of contacts that you can add to your personal address book is dependent on your Service Package.

To add a contact to your personal address book

1 Click the  "New" icon on the Personal Address book page. The add new entry page appears.

2 Complete the fields with your contact’s personal information. Required fields are indicated with an asterisk (*).

3 Click in the checkbox next to the Friend icon to designate a personal address book contact as one of your Friends.

4 Select a group for the contact using the Group drop down list.

5 Click **Save** to save this contact to your personal address book and close the window, or **Cancel** to return to your personal address book.

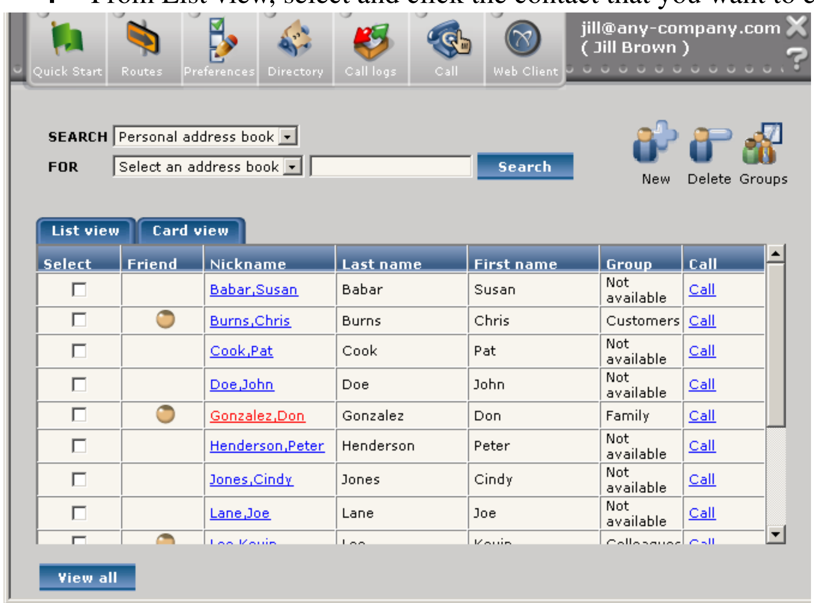
Editing a contact

There may be times when you wish to modify information about a contact in your address book.

Editing a contact - List view

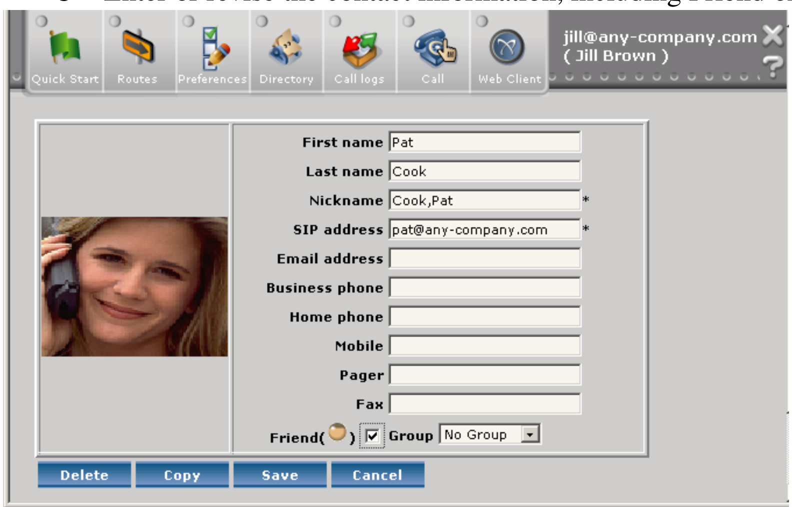
To edit details about a contact (List view) in your personal address book

1 From List view, select and click the contact that you want to edit.



2 On the contact details page that appears, click "**Edit**".

3 Enter or revise the contact information, including Friend or Group selections.



4 Click **Save** to save the changes, **Delete** to delete the contact, **Copy** to copy the information, or **Cancel** to return to the previous screen.

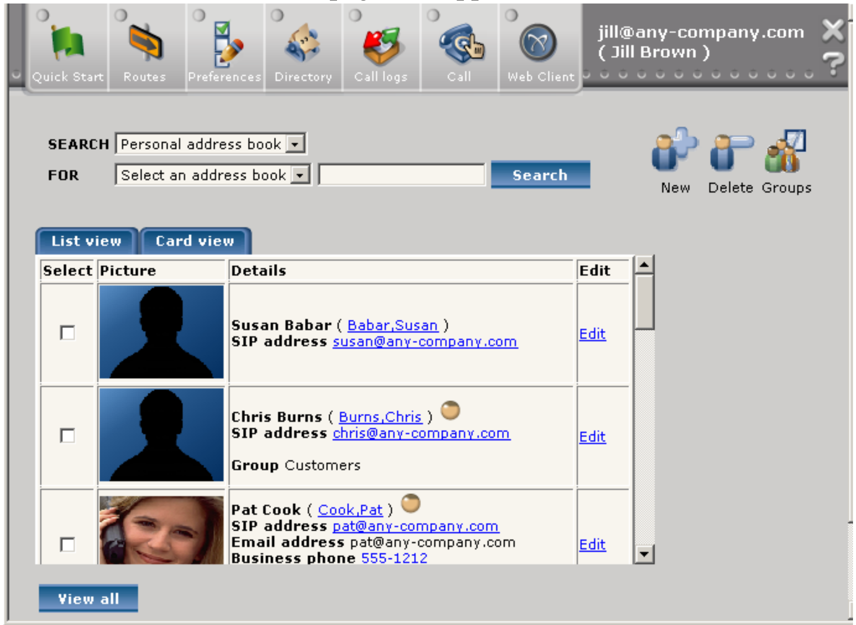
5 Click **Back** to return to your personal address book.

Editing a contact - Card view

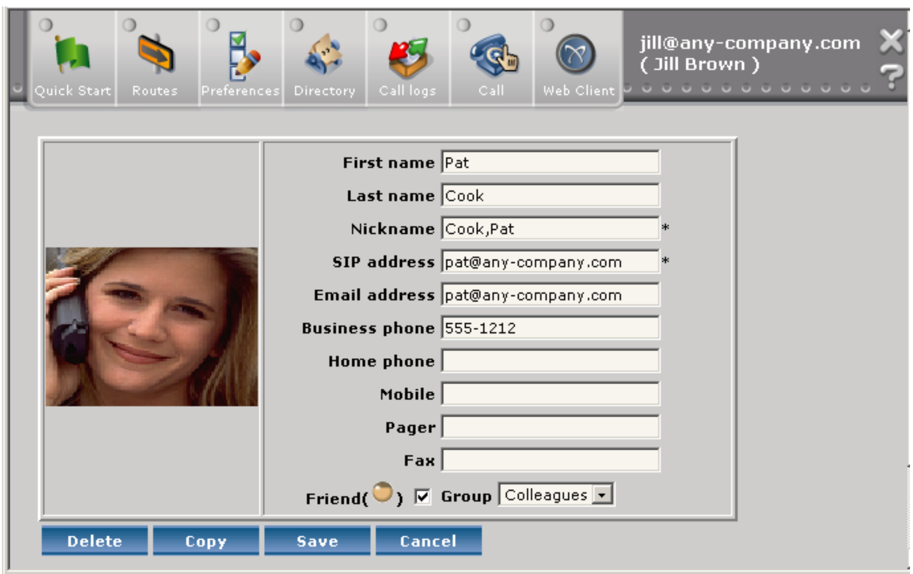
To edit details about a contact (Card view) in your personal address book

1 From Card view, select the contact that you want to edit.

2 On the contact details page that appears, click Edit in the Edit column.



3 Enter or revise the contact information, including Friend or Group selections.



4 Click **Save** to save the changes, **Delete** to delete the contact, **Copy** to copy the information, or **Cancel** to return to the previous screen.

5 Click **Back** to return to your personal address book.

Deleting a contact

To select a contact (or a number of contacts) to delete

1 Enter a checkmark in the checkbox in the **Select** column next to the contact (or number of contacts) you wish to delete.

2 Click the  "Delete" icon on the personal address book page.

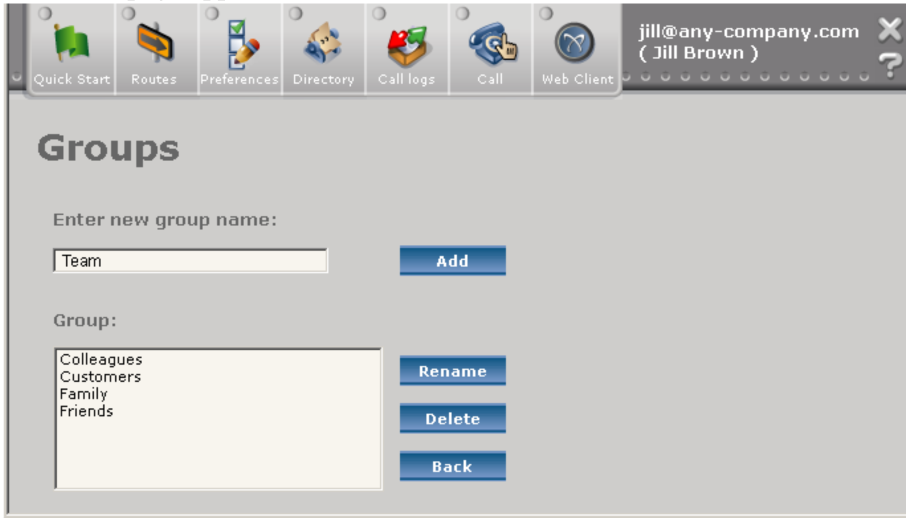
3 Click **OK** when you are prompted to confirm the deletion. The contact is deleted from your personal address book that is dynamically synchronized with the Multimedia Web Client, the Multimedia PC Client, and the i2002/ i2004 Internet Telephone.

Adding a new group

Before you begin adding contacts to your personal address book, you will want to create a group for the contact to belong to. For example, you can create a group called “Work” for your office contacts, another called “Personal” for your personal contacts in another, and so on.

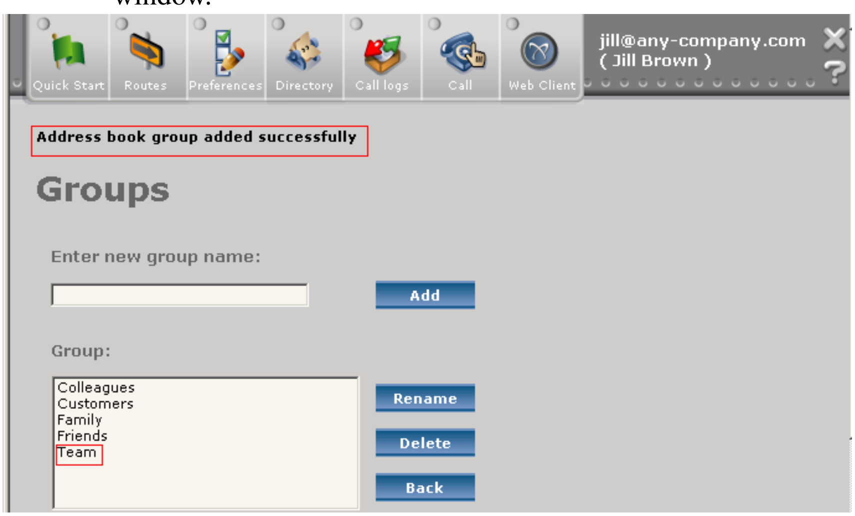
To add a new group

1 From the personal address book, click the  "Groups" icon. The Groups page appears.



2 Enter the name of the Group. For example, you can group all the members of your family into a group called “Family”.

3 Click **Add**. The message “Address book group added successfully” appears at the top of the Groups screen. The new group now appears in the Groups window.



4 Click **Add** to add more groups. To rename a group, select the group in the Groups window and click **Rename.** To delete a group, select the group and click **Delete**.

5 Click **Back** to return to your personal address book.

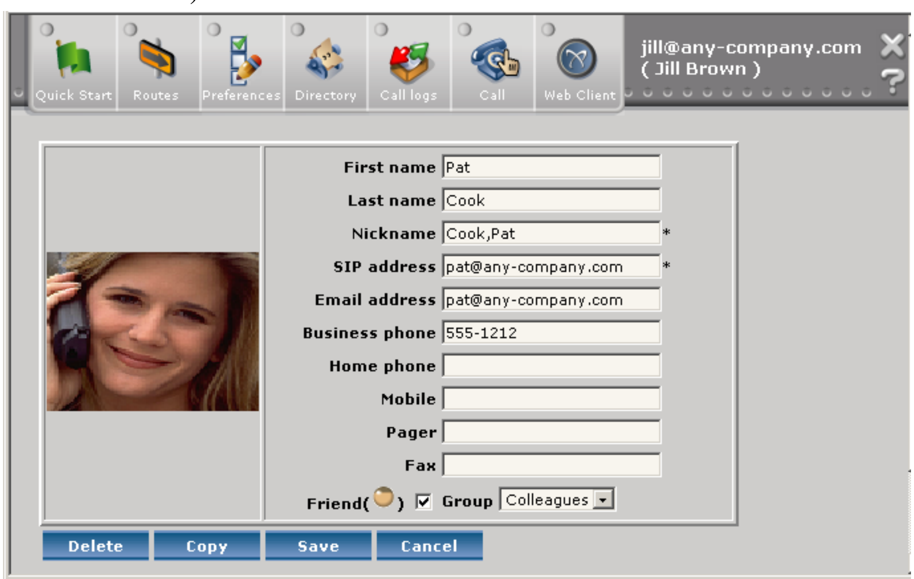
Designating a contact as a Friend

> **Note:** Presence must be enabled in your service package in order to be able to select the Friend check box for designating a contact as a Friend in your personal address book. Your service package determines the maximum number of contacts that you can designate as Friends. By designating a contact as a Friend you are able to view their activity by clicking the icon Friends Online in the Multimedia web client. For more information refer to the "*Multimedia Web Client User Guide*".

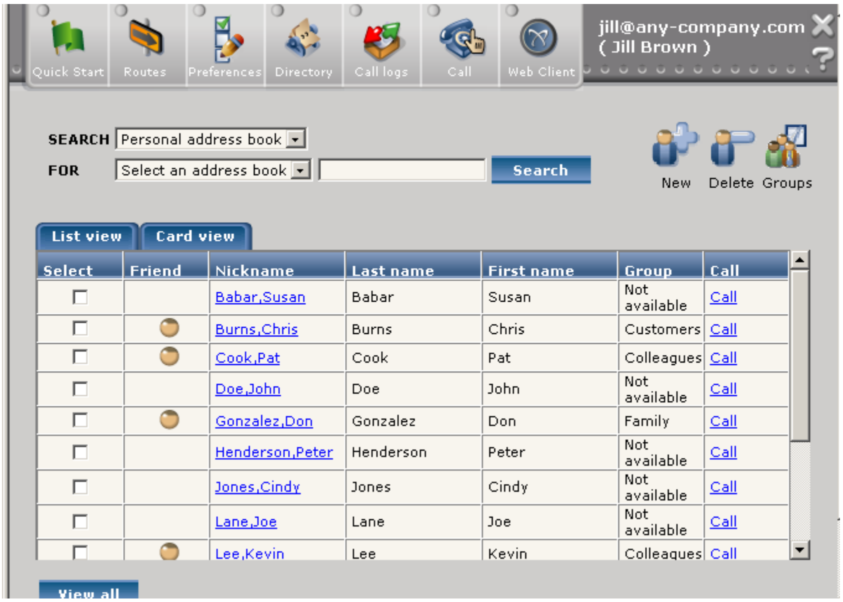
The Personal Agent allows you to create, view, and update a contacts as a Friend. Friends may be people that you work with or correspond with regularly.

To designate a contact as a Friend

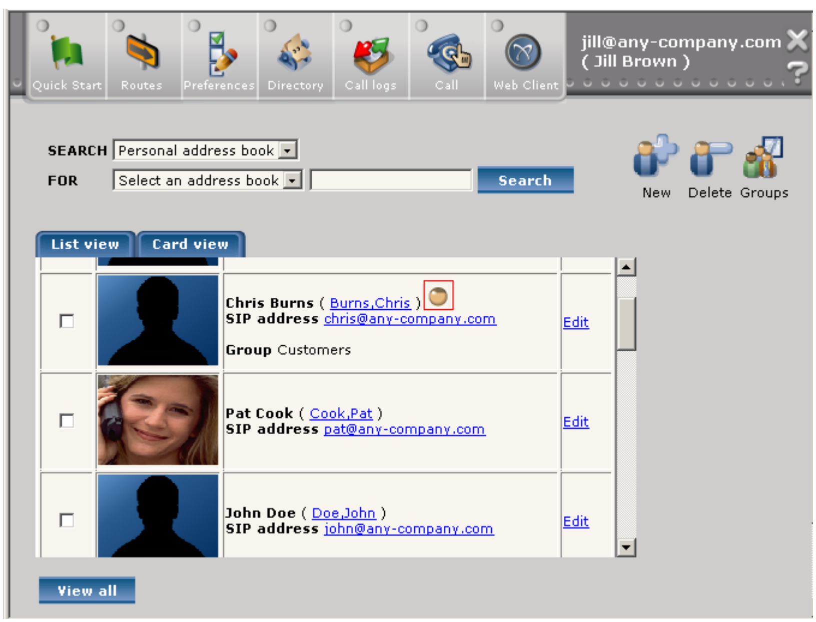
1 Click on the checkbox next to the "Friends"  icon when entering or completing contact information in your personal address book (Card view or List view).



2 Click **Save**. The contact you designated as a Friend now appears in your personal address book (List view) with the Friends icon appearing in the Friends column for the selected contact.



In Card view, the contact you designated as a Friend appears with the Friend icon next to the contact name.



3 To delete a contact as a Friend, uncheck the checkmark next to the Friend icon in the contact details page (List view or Card view) and click **Save.**

Tip: You can also use the Multimedia PC Client, Multimedia Web Client, i2002 or i2004 Internet Telephone to see whether or not a Friend is online.

Using the global address book

Your global address is a directory of all users in your domain. This list is created and maintained by your service provider or system administrator.

Your global address book has two viewing options for your contacts:

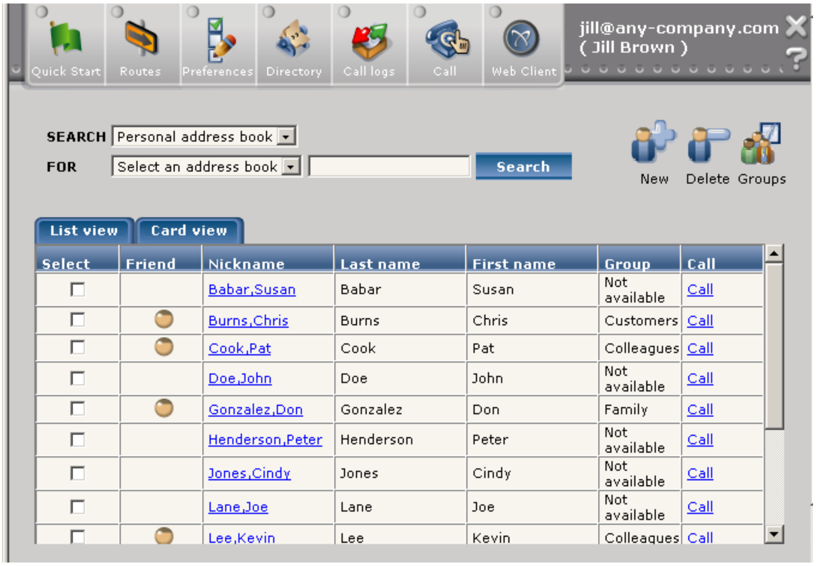
- List view -- a traditional “table-like” view
- Card view -- information as you would normally see on a business card (including a picture of the contact, if available)

Accessing the global address book

To the global address book

1 Click the **Directory** icon from the Personal Agent Quick Start page or from the top navigation menu.

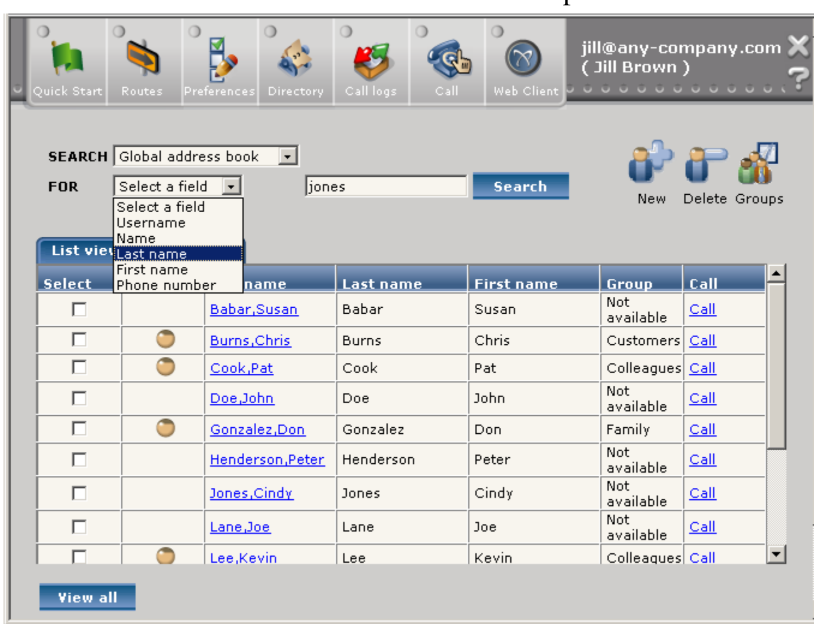
Note: By default, the active book is always your personal address book in List view format.



2 To display users from the global address book

a Select Global address book from the drop down list next to the **SEARCH** field.

b Select a field to search **FOR** from the drop down list.



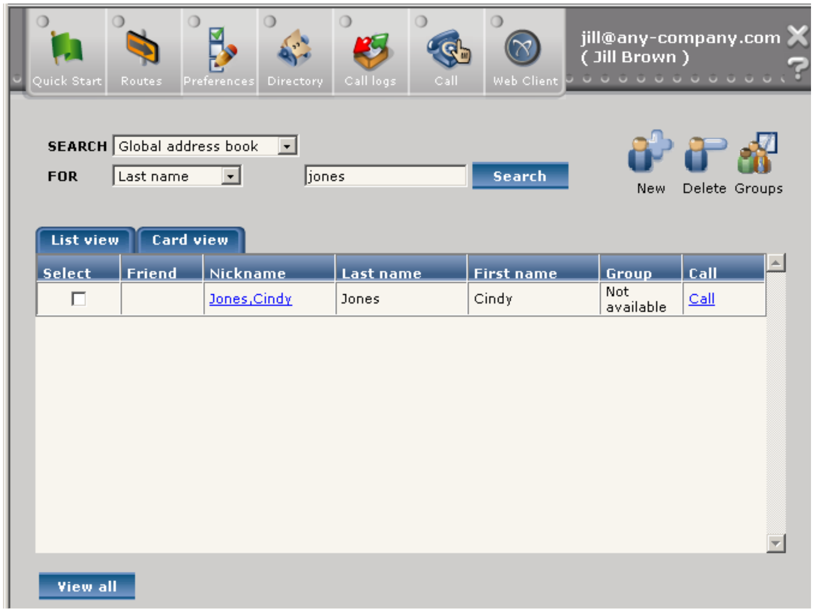
c Enter a search string in the text box as described in the following table. For a complete list of the search criteria you can specify to search for a contact see "Global Address Book search criteria" on page 114.

Field	**Search criteria**
Username	Username of the user (assigned by your service provider or system administrator).For example, eburns.
Name	• First name and last name of the user. For example, searching for a user with the Name of Smith will display users with the first name Smith and contacts with the last name Smith. • Both first and last name. For example, the string John Smith will return users with the first name John and the last name Smith.The search string Smith, John, will also return the same users. • Name matching continuation. For example entering a **y** returns all users starting with the letter **Y**.
Last name	Last name.
First name	First name.
Phone number	Telephone number.

Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n will return all contacts named John, Jon, Jen etc.

Use quotation marks "," before and after a search string to specify an exact match. For a complete list of the search criteria refer to Appendix A, "Address Book Search Criteria," on page 111.

d Click **Search**. The global address book appears, in List view, with the results of the user search specified.



3 To return to your personal address book, click **Return to my address book**.

Working with the global address book - List view

The global address book allows you to access a single, common network-wide address book, in a list format.

Sorting users

To sort users in the global address book

1 Click a column name (for example, **Last name, First name**, **Office**, or **Home**).

2 Click the column name again to sort in reverse.

Searching for a user

To search for a user in the global address book in List view

1 Select Global address book from the drop down list next to the **SEARCH** field.

2 Select a field to search on as described in the following table.

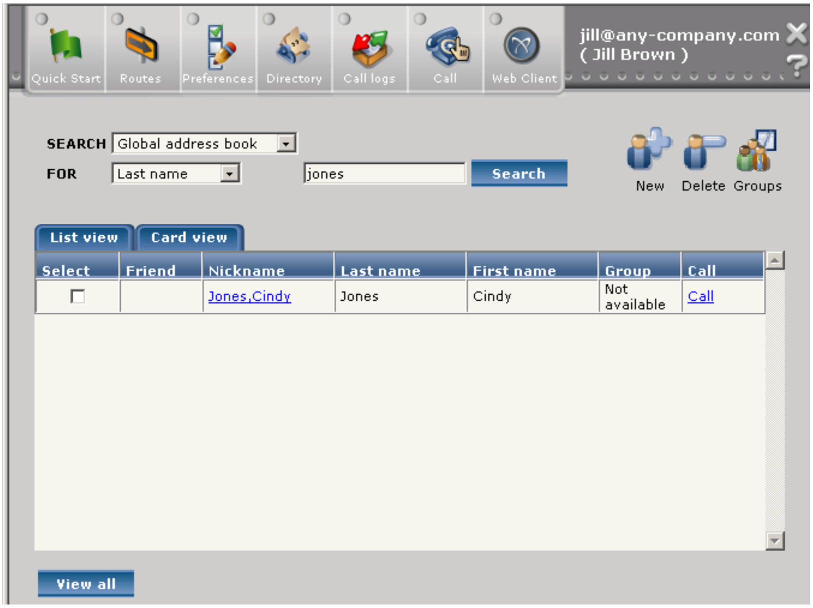
Field	**Search criteria**
Username	Username of the user (provisioned by your service provider or system administrator). For example, eburns.
Name	• First name and last name of the user. For example, searching for a user with the Name of Smith will display users with the first name Smith and users with the last name Smith. • Both first and last name of the user. For example, the string John Smith will return users with the first name John and the last name Smith.The search string Smith, John, will also return the same users. • Name matching continuation. For example, entering a **y** returns all users starting with the letter **Y**.
Last name	Last name of the user.
First name	First name of the user.
Phone number	Telephone number of the user.

3 Enter your search criteria.

Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n will return all contacts named John, Jon, Jen etc.

Use quotation marks "," before and after a search string to specify an exact match. For a complete list of the search criteria refer to Appendix A, “Address Book Search Criteria,” on page 111.

4 Click **Search**. The results of your search appears.



5 Click **Return to my address book** to access your personal address book.

Viewing details about a user

To view details about a user in the global address book

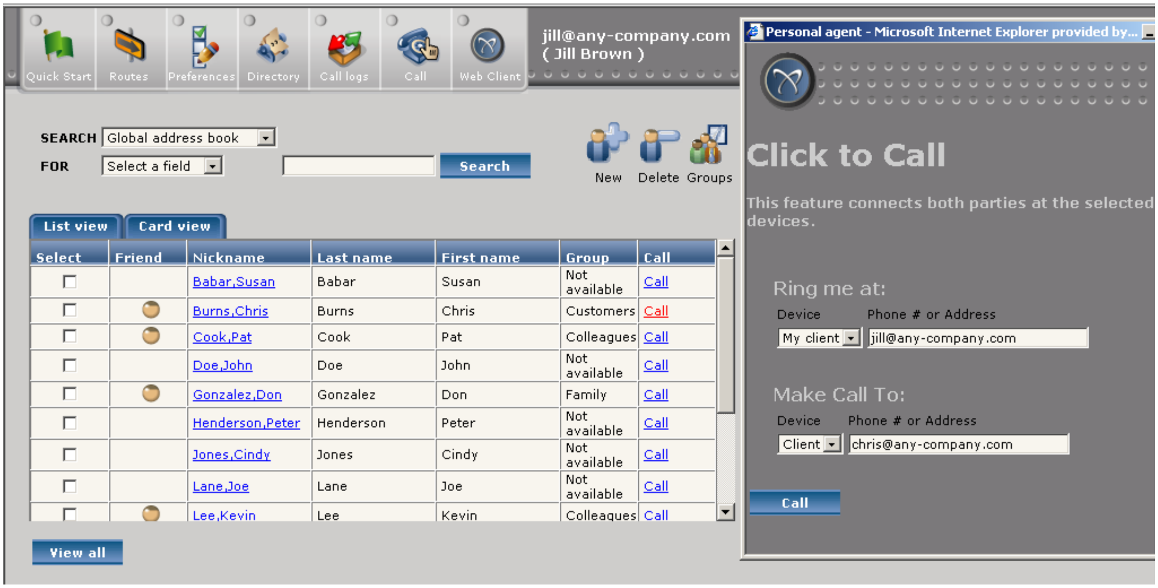
1 Click on a highlighted user in the **Last name**, **First name**, **Office**, or **Home** column. A page appears listing details about the user, including an icon that indicates their presence status on the network.

2 Click **Close** to return to the global address book page, or click **Add** to add this user to your personal address book.

Initiating a call to a global address book user

To initiate a call to user in the global address book

1 Click the **Call** link in the **Call** column to initiate a call to the user in your global address book. The Click to Call window pops up, simply click the "**Call**" button to connect.



2 For information on how to use click to call, see Chapter 5, “Using click to call to make calls,” on page 81.

Working with the global address book - Card view

To access the global address book in Card view

1 Select Global address book from the drop down list next to the **SEARCH** field.

2 Select a field to search on as described in the following table

Field	**Search criteria**
Username	Username of the user (provisioned by your service provider or system administrator). For example, eburns.

Name	• First name and last name of the user. For example, searching for the user with the Name of Smith will display users with the first name Smith and users with the last name Smith. • Both first and last name of the user. For example, the string John Smith will return users with the first name John and the last name Smith.The search string Smith, John, will also return the same users. • Name matching continuation. For example, entering a **y** returns all users starting with the letter **Y**.
Last name	Last name of the user.
First name	First name of the user.
Phone number	Telephone number of the user.

3 Enter your search criteria.

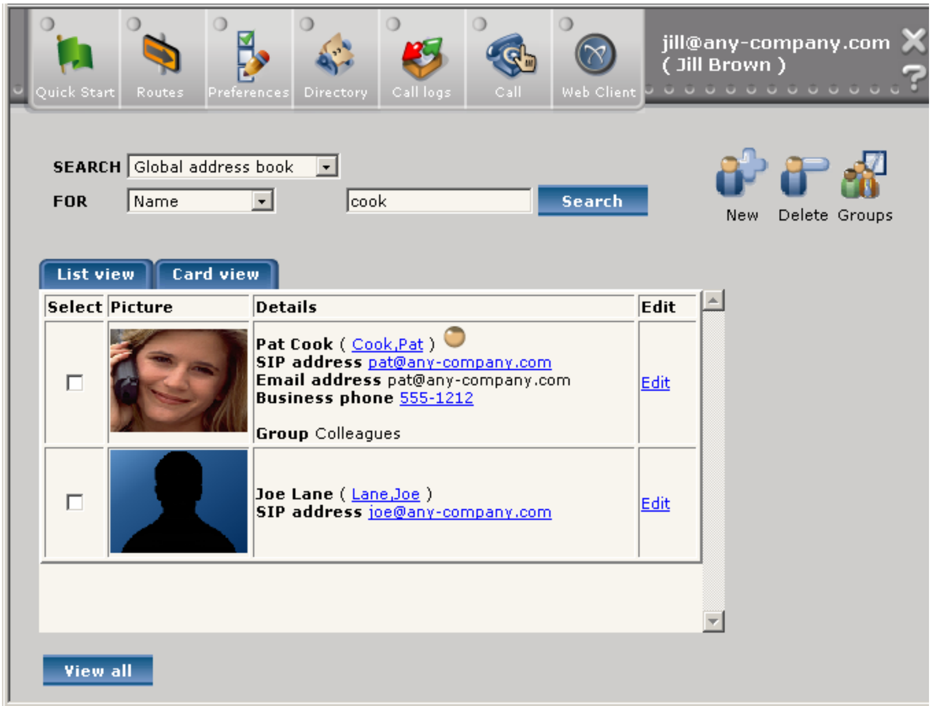
Tip: You can enter a wildcard symbol (*) at the beginning or middle of a search string. For example, searching for J*n will return all contacts named John, Jon, Jen etc.

Use quotation marks "," before and after a search string to specify an exact match. For a complete list of the search criteria refer to Appendix A, “Address Book Search Criteria,” on page 111.

4 Click **Search**. The results of your search appears in **List view**.

5 To see the results of your search in Card view, click the **Card View** tab. The global address book displays the user, or users, in your global address book

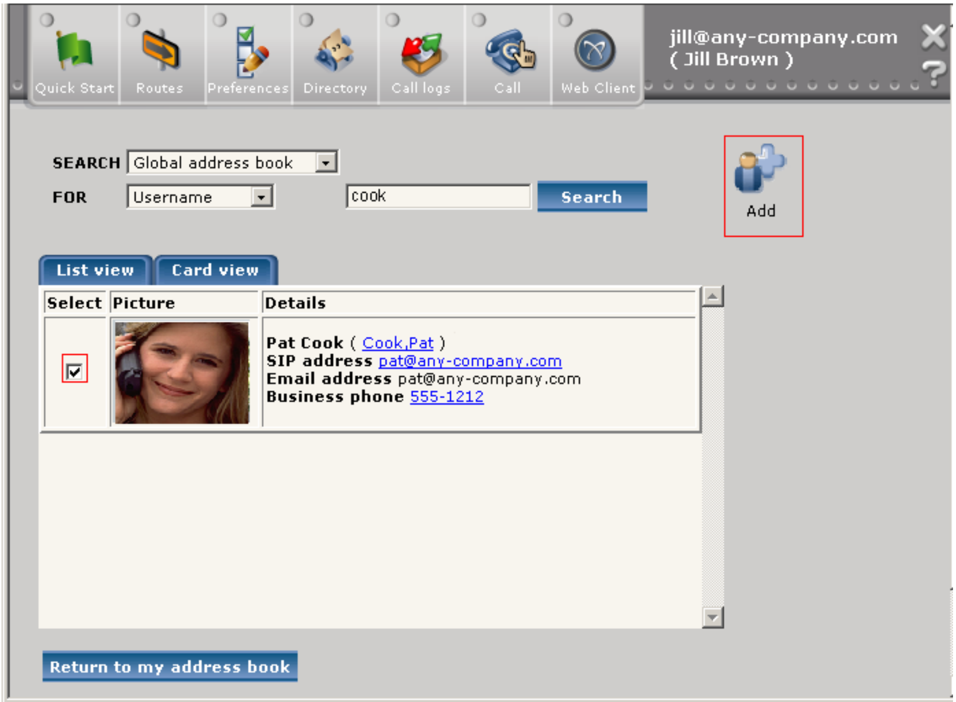
that match the specified search criteria and includes a thumbnail picture of the user (if available).



Adding global address users to your personal address book

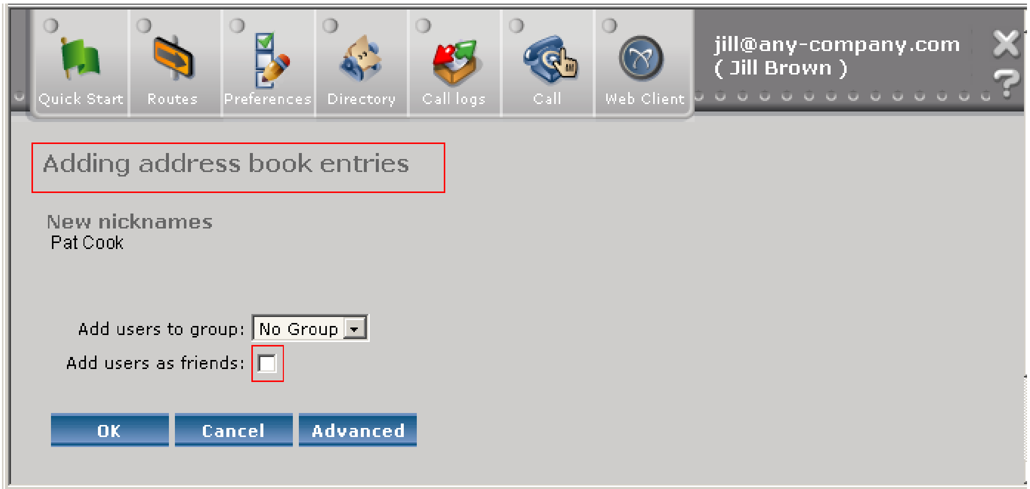
To select a user to add to your personal address book from the global address book (Card view or List view) you must first perform a search in the Global address book See “Searching for a user” on page 67:

1 Following the search enter a checkmark in the checkbox in the **Select** column next to the user (or number of users) you wish to add.



2 Click the "Add"  icon to "Add selected entry/entries to Personal Address Book".

3 The message window "Adding address book entries" is show, be sure to check the "Add users as friends:" checkbox, designate a group if desired and click the "OK" button.



Note: You will receive an error message if you attempt to add users from your global address book that have the same **Last name** or **First name** as the **Nickname** field defined in your personal address book.

Your personal address book appears.

Chapter 4
Call logs

The Personal Agent allows you to view a list of the incoming and outgoing calls made by any device that you are logged in to.

Topics in this section

Viewing call logs

Click on the **Call logs** icon 

in the top navigation bar.

The Call Logs page appears with the inbox call log information (by default). To view the outbox call log, click on the **Outbox** tab at the top of the window.

The inbox call log shows all of the incoming calls to you with information about the caller's name, time of the call, duration and caller address. The icons in the Type column are as follows:

	indicates that the call was answered
	indicates that the call was not answered

The outbox call log shows the name of the person you called, the time of the call, duration and SIP address.

Note: Network-based call logs will be able to capture the log for calls missed whether the caller leaves a message or not. The icons above indicate whether the call was answered or not.

Calling contacts in the call log

1. Click the Call logs icon in the top navigation bar.
2. Select your call log tab (if required).
3. Click the **Call** link beside the contact name. The Click to Call window appears.

4. Complete the following actions for **Ring me at:**
   - **a** Device **-** select a device from the drop down list that you wish to initiate the call **from**.

b Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for calling the personal address book contact.

5 Complete the following actions for **Make Call To:**

a Device **-** select a device from the drop down list that you wish to initiate the call **to**.

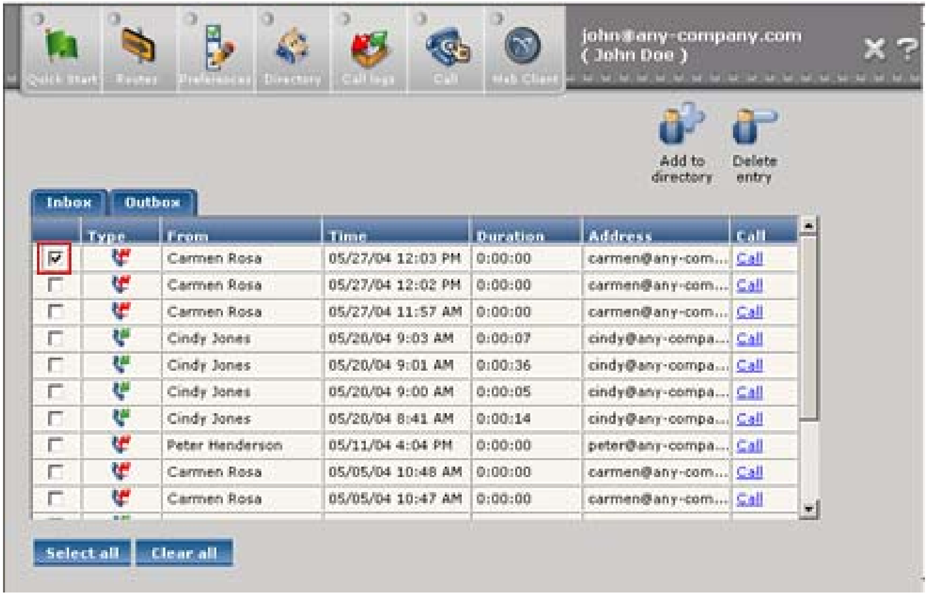
a Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for the receiving call **from** the contact in your personal address book.

6 Click **Call**. At this point, both sides of the call are rung. The system waits for you to answer then initiates a second call to the contact your personal address book.

Saving contacts from the call log information

To save a contact from a call log to your personal address book

1 From either the "Inbox" or the "Outbox" view click the checkbox beside the name of the contact you want to save.



2 Click the **Add to directory** icon. The Directory page appears with a message confirming that the contact was successfully added. The new contact appears in the Directory list.

Clearing call log information

To remove one or more entry in a call log

1 Click the checkbox beside the name of the contact you want to delete.

2 Click the Delete entry icon. You are prompted to confirm the deletion. Click **Ok** to confirm the deletion. The Call logs page refreshes and the entry is gone.

Tip: The **Select all** button under the call log adds a checkmark to every entry in the call log. The **Clear all** button removes the checkmark beside entries in the call log.

Chapter 5
Using click to call to make calls

The Personal Agent allows you to initiate calls to contacts in your personal address book as well as the global address book by using the click to call functionality.

Using click to call, you enter a phone number or SIP address of the device where you want to take the call, then enter the called party number. The phone then rings at your preferred device. After answering, you are connected with the called party.

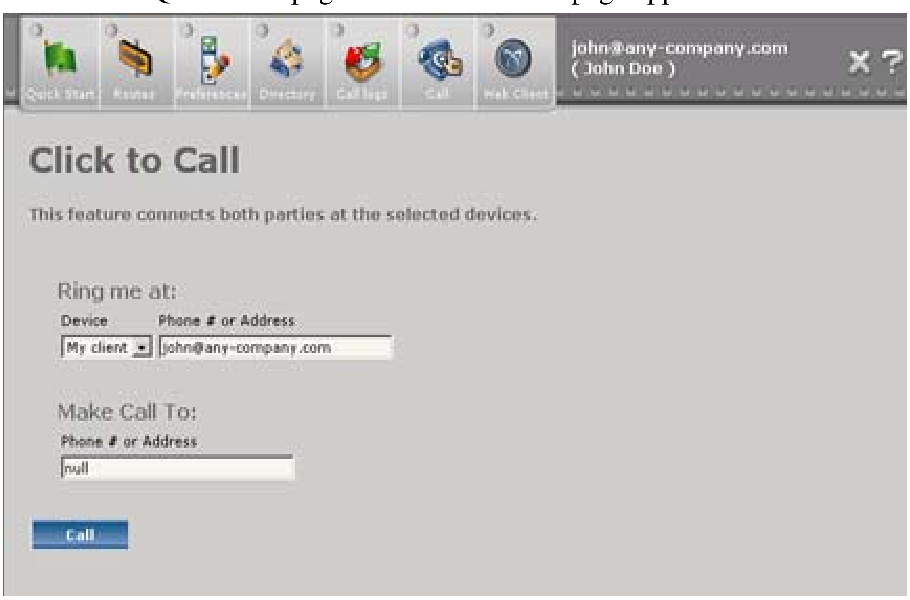
Topics in this section

Using the click to call icon

To initiate a call using the click to call icon

1 Access the Personal Agent Quick Start page.

2 Click the **Call** icon from the top navigation menu or the **Click to Call** link on the Quick Start page. The Click to Call page appears.



3 Modify the calling and called numbers of the contact (in your personal address book or the global address book of your system) that you are calling. If you do not want to use a pre-configured phone number or registered SIP address for the calling or called party, then enter a new number or registered SIP address.

4 Click **Call**. At this point, your device is rung. The system waits for you to answer then initiates a second call to the contact in your personal or global address book.

Using click to call from your personal address book

To initiate a call from your personal address book

1 Locate the contact in your personal address book.

2 Click the **Call** link in the **Call** column (List view) or the phone number or SIP address link (Card view) for the contact in your personal. The Click to Call window appears.

3 Complete the following actions for **Ring me at:**

a Device **-** select a device from the drop down list that you wish to initiate the call **from**.

b Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for calling the personal address book contact.

4 Complete the following actions for **Make Call To:**

a Device **-** select a device from the drop down list that you wish to initiate the call **to**.

a Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for the receiving call **from** the contact in your personal address book.

5 Click **Call**. At this point, your device is rung. The system waits for you to answer then initiates a second call to the contact your personal address book.

Using click to call from the global address book

To initiate a call from your global address book

1 Locate the user in the global address book.

2 Click the **Call** link in the **Call** column (List view) or the phone number or SIP address link (Card view) for the contact in the global address book. The Click to Call window appears.

3 Complete the following actions for **Ring me at:**

a Device **-** select a device from the drop down list that you wish to initiate the call **from**.

b Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for calling the user in your global address book.

4 Complete the following actions for **Make Call To:**

a Device **-** select a device from the drop down list that you wish to initiate the call **to**.

a Phone # or Address **-** enter a new number or registered SIP address if you do not want to use a pre-configured telephone number or registered SIP address for the receiving call **from** the user in your global address book.

5 Click **Call**. At this point, both sides of the call are rung. The system waits for you to answer, then initiates a second call to the user in the global address book.

Chapter 6
Using the Personal Agent Route Wizard

The Personal Agent Route Wizard solves the problem of having different contact numbers for different communication devices (office phone, home phone, mobile). Call screening allows the user to build a route or routes, using the Route Wizard, for all or specified incoming calls and the option to block any anonymous callers.

➡ **Note:** The ability to use the Personal Agent Route Wizard to set up routes for your incoming calls is dependent upon your service package. If Advanced screening is not enabled in your service package, then you will not be able to use the Personal Agent routing capabilities. If you do not have routing capability, a default route is defined for you that will ring your phone, and, if you are subscribed to the voicemail service, the call is sent to voicemail.

➡ **Note:** The Assisted User utilizes the Route wizard in the Personal Agent to route incoming calls to the designated assistant groups. Refer to the "**Assistant Console and Assisted Support Getting Started Guide**" for specifics.

Topics in this section

- "Using the Personal Agent Route wizard" on page 89

Tip: Some features, such as Call forward, can be set at the i2002 and i2004 Internet Telephones and may override the routes that you set on the Personal Agent.

What is routing?

A route allows you to perform different actions on a your incoming calls and/or Instant Messages based on a set of conditions or exceptions. For example, you can create a route named "Lunch" that specifies a condition that calls received between 12:00PM and 1:00PM Monday through Friday are to be affected by the route. The route "Lunch" would also have an action that specifies that calls that are affected by the route will ring the your mobile phone first, and then send the call to voicemail.

Tip: Routes are applied to incoming calls in the order in which they are listed in the List of Routes window. Click **Move up** or **Move down** to change the order of how your incoming calls are treated.

What is the Personal Agent Route wizard?

You can create routes with the Personal Agent Route wizard. The wizard is a step-by-step procedure that makes the task of creating rules and conditions for your incoming calls easier.

Use the Route wizard to:

- define routes for how your incoming calls and Instant Messages are handled
- specify conditions as to how specific calls should be presented to you and on what devices in a simultaneous or sequential fashion.
- define personalized time blocks to further define your routes so that you are always in reach
- send an Instant Message (IM) when processing a ring list

Understanding the Route wizard steps

The following table describes the steps you will follow when you create a route using the Personal Agent Route wizard.

Step...	Specifies...
1: Initiate action	main action or actions that initiates the processing of the route. There are two options listed here to select from: "**When a call is received** or“**When an Instant Message** is received”. Select the desired option by clicking on the appropriate checkbox.
2: Conditions	filtering of conditions respective to the call originator and the time of day that must apply before the Actions in Step 3 can take place.
3: Actions	what action, or actions, are performed when a call is received. Actions are defined with respect to the services enabled in your service package.
4: Exceptions	exceptions to the filtering conditions defined in Step 2.
5: Finish	name of the route, and whether the route should be active (or not), and saved (or not).

Navigating the Route wizard

When you have entered the required data for each step, click:

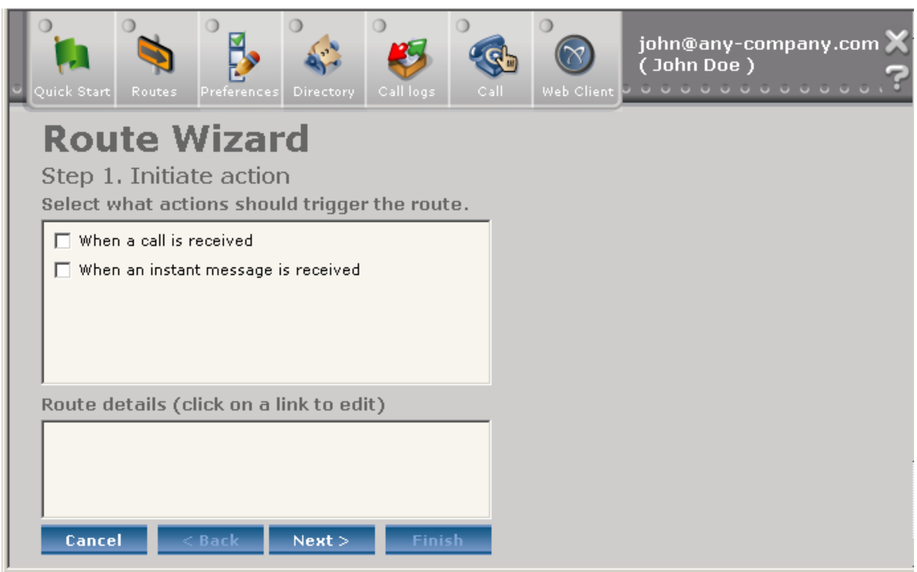
- **Next** to go to the next step.
- **Back** to change your decision.
- **Cancel** to cancel the creation or modification of the route.
- **Finish** to complete a step.
- **Save** to save the route.

Using the Personal Agent Route wizard

To get started with the Personal Agent Route wizard

1 Click the **Route** icon from the Personal Agent Quick Start page or from the top navigation menu. The first time you use the Route Wizard, the List of Routes page appears with a default (permanent) route checked and greyed out.

2 Click **New** to go to Step 1, Initiate action.The Initiate action page appears.



Step 1: Initiating action

In Step 1, you specify the main action or actions that initiate the processing of the route. Currently, the only action you can take at Step 1 is "When a call is received". From the initiate action page click **Next** to go to Step 2, Conditions.

Step 2: Specifying conditions

Step 2 of the Route Wizard allows you to specify the following conditions to filter how your incoming calls will be handled by the route you are setting up.

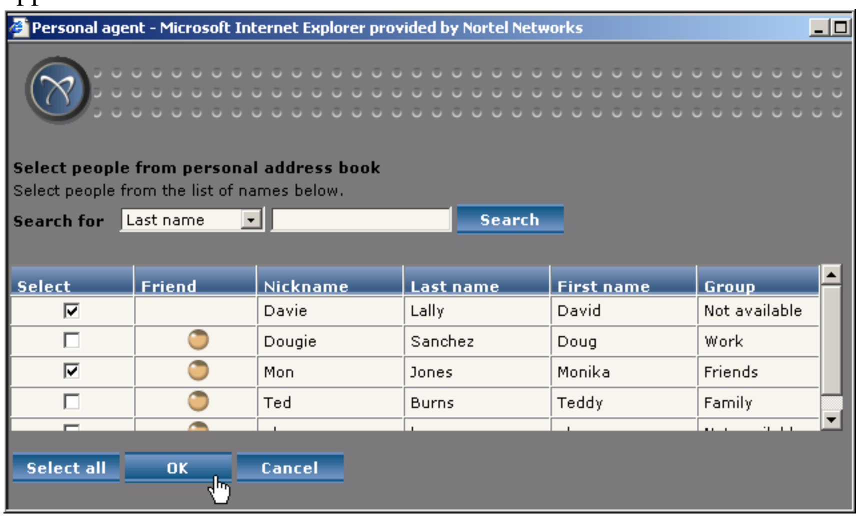
Click this link...	to specify...
From THESE PEOPLE in my Personal Address Book	a contact (or contacts) from your personal address book that you want to include in the condition.
From THESE PEOPLE in my Global Address List	a user (or users) from the global address book that you want to include in the condition.
From THESE GROUPS	the lists of contacts that you have organized into meaningful groups in your personal address book (for example, Friends, Family, Work, Projects) that you want to include in the condition.

Click this link...	to specify...
From THESE TELEPHONE NUMBER(S)	the SIP Address or phone number of the person (or persons) calling you.
SPECIFIC DAY/TIME RANGE(S)	the days and hours of the day and week when you want the condition to apply. For information on using the My Times feature to set up Day/Time ranges, see “Setting up My Times date and time ranges” on page 21.

Specifying contacts from your personal address book

To specify a contact (or contacts) from your personal address book as a condition

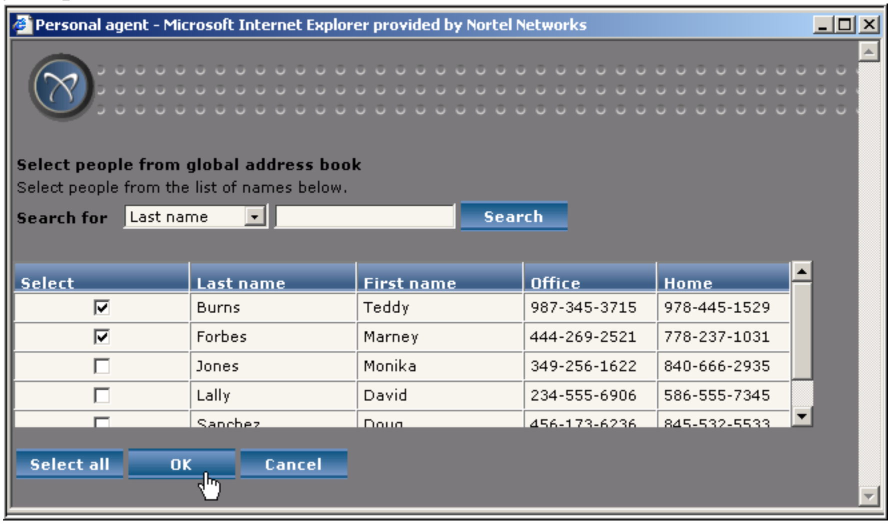
1 Click the link, **From THESE PEOPLE**. Your personal address book window appears.



2 Enter a search criteria in the **Search for:** field to select a contact (or contacts) from your personal address book.

3 Select a contact (or contacts) from the **Select** column, or, click **Select all** to select all contacts to include in the condition.

4 Click **OK** to accept the selected contacts, or **Cancel** to quit this window. The Step 2. Conditions window appears with the conditions you specified from your personal address book listed in the Route details window.



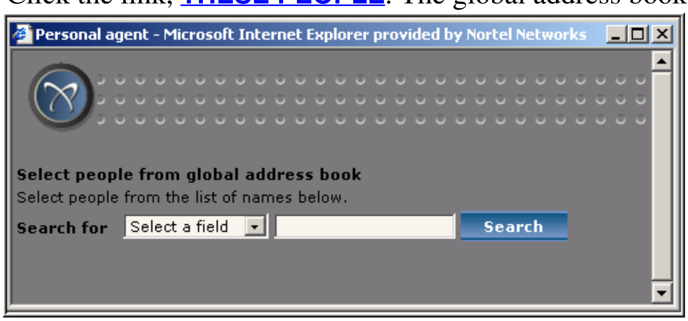
5 To edit the condition, click the link in the Route details window.

6 Continue to specify conditions, or click **Next** to go to the next step.

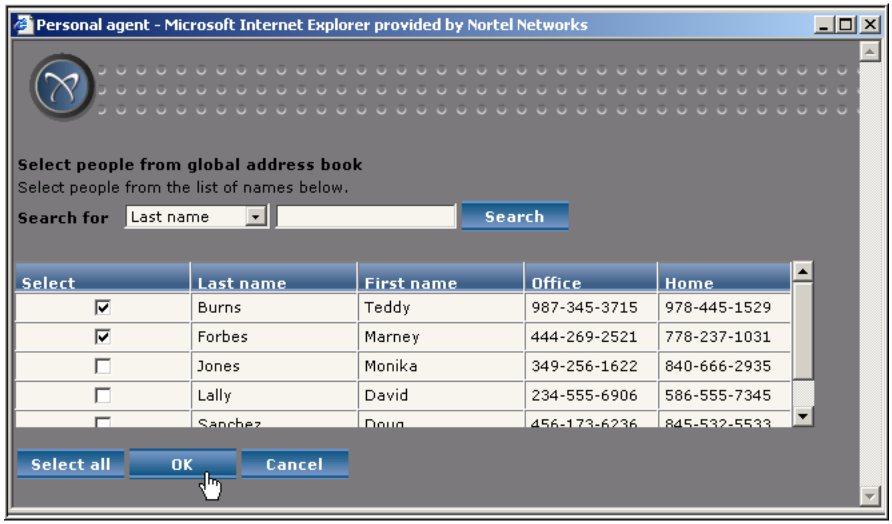
Specifying users from the global address book

To specify a user (or more than one user) from the global address book as a condition

1 Click the link, **THESE PEOPLE**. The global address book window appears.



2 Enter a search criteria in the **Search for:** field to select a user (or group of users) from the global address book. The result of your search appears in the window below.



3 Select a user (or group of users) from the **Select** column, or, click **Select all** to select all users from the global address book.

4 Click **OK** to accept the selected users, or **Cancel** to quit this window. The Step 2. Conditions window appears with the global address conditions you specified listed in the Route details window.

5 To edit the condition, click the link in the Route details window.

6 Continue to specify conditions, or click **Next**, to go to the next step.

Specifying groups

To specify a group as a condition

1 Click the **THESE GROUPS** link. The group window appears.

2 Select the group (or groups) of people that you have organized into groups (such as Family, or Friends) as defined in your personal address book.

3 Click **Select all** to select all groups.

4 Click **OK** to accept the selected groups, or **Cancel**, to quit this window. The Step 2. Conditions window appears with the group conditions you specified listed in the Route details window.

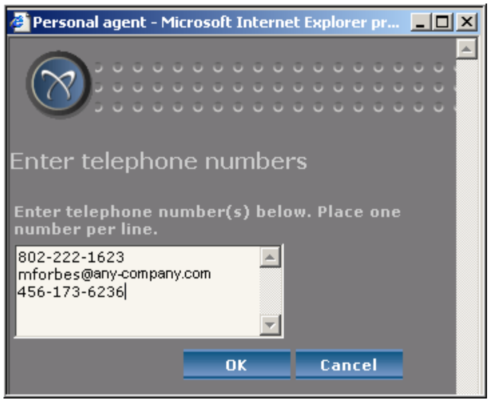
5 To edit the condition, click the link in the Route details window.

6 Continue to specify conditions, or click **Next**, to go to the next step.

Specifying telephone numbers

To specify a phone number, a list of phone numbers, or a SIP Address, of an incoming call as a condition

1 Click the THESE TELEPHONE NUMBER(S) link. The telephone number window appears.



2 Enter a phone number (or a list of phone numbers), or a SIP address. (Add one number or SIP address per line that the filter will apply to.)

3 Click **OK** to accept the selected phone numbers or SIP addresses, or **Cancel**, to quit this window. The Step 2 Conditions window appears with the phone conditions you specified listed in the Route details window.

4 To edit the condition, click the link in the Route details window.

5 Continue to specify conditions, or click **Next** to go to the next step.

Specifying a condition for an anonymous incoming call

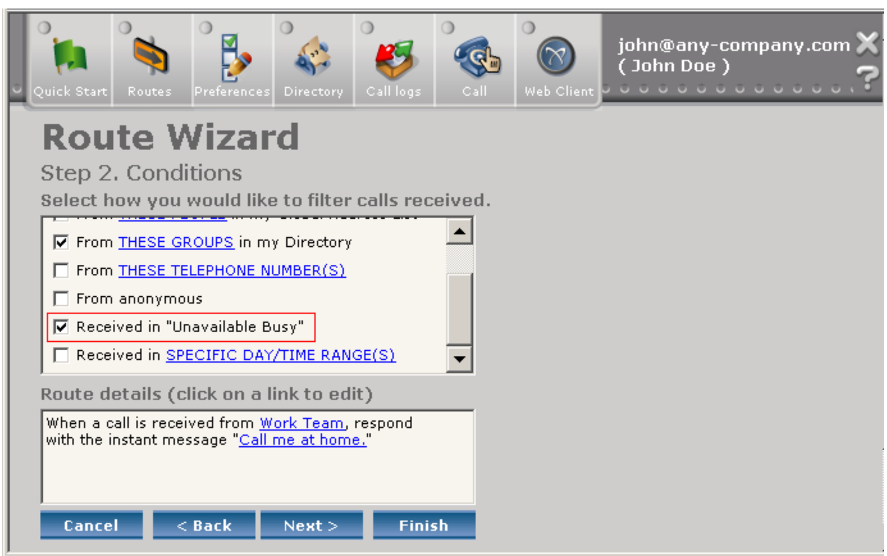
You can set up the following conditions about how to handle incoming calls from an anonymous caller:

- reject the incoming call without specifying a reason
- reject the call and specify a reason for the rejection
- send the call to voice mail (if enabled in your service package)
- specify the call to be sent to a particular phone number

For information on setting up the actions for an incoming anonymous call, see, “Specifying an ordered list” on page 102, and “Specifying a rejection message” on page 104.

To specify an anonymous caller condition

1 Select the **Received in “Unavailable Busy”** option in the Step 2: Conditions window.



2 Continue to specify conditions, or click **Next**, to go to the next step.

Specifying a condition for 'Unavailable Busy'

You can set up the following conditions about how to handle incoming calls when your presence state is set to 'Unavailable Busy':

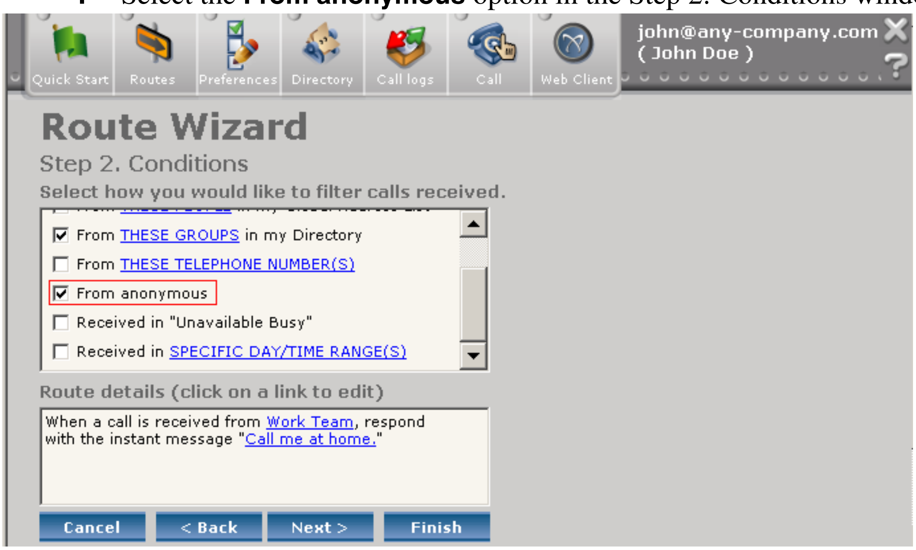
- reject the incoming call without specifying a reason
- reject the call and specify a reason for the rejection
- send the call to voice mail (if enabled in your service package)
- specify the call to be sent to a particular phone number

Tip: This parameter is only available if Presence Based Routing is enabled in your service package.

For information on setting up the actions for an incoming calls while you are 'Unavailable Busy', see "Specifying an ordered list" on page 102, and "Specifying a rejection message" on page 104.

To specify an incoming call condition while 'Unavailable Busy'

1 Select the **From anonymous** option in the Step 2: Conditions window.



2 Continue to specify conditions, or click **Next**, to go to the next step.

Specifying Day/Time ranges

1 To specify the days and times ranges for the condition to apply.

2 Click the **SPECIFIC DAY/TIME RANGE(S** link. The My Times page appears.

Tip: For complete information on setting up My Times Day/Times ranges, see "Setting up My Times date and time ranges" on page 21.

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3 Select a previously defined day and time range (for example, My Office Hours).

View the graphic display of highlighted My Times.

4 Use the buttons to create new My Times Day/Time ranges or manage existing My Time Day/Time ranges.

5 Click **Save** to accept selected My Times, or **Cancel** to quit this window. The Step 2 Conditions window appears with the My Times conditions you specified listed in the Route details window.

6 To edit the condition, click the link in the Route details window.

7 Continue to specify conditions, or click **Next**, to go to the next step.

Step 3: Actions

Step 3 of the Route Wizard allows you to specify what action, or actions to perform on your incoming calls. For example, you can set up the following mutually exclusive actions:

- specify numbers to ring simultaneously or sequentially in ordered lists
- send a rejection message (PSTN callers will receive a busy tone)
- send the request to email (PSTN callers will receive a busy tone)
- pop up a call window

- send the call to voice mail

Note: Actions are defined with respect to the services, such as Converged Desktop or Advanced screening, that are enabled in your service package. The option to pop up a call window or send the call to voice mail actions are only available when you are subscribed to the Converged Desktop or Voice Mail services, respectively.

Specifying ordered lists

The Personal Agent allows you to set up how and where you want your incoming calls to ring by using ordered lists. An ordered list is a group of SIP addresses or phone numbers associated with your user name (the name you register under) in your organization's or service provider's user database. The basic purpose of an ordered list is to enable your incoming calls to follow you if you are not at your desk or primary device location.

Using ordered lists, you can specify the sequence of phone numbers to ring first, second, and so on. You can then specify how many times the phone in each list should ring. Finally, you can specify whether or not the incoming call should go to voice mail (if you are subscribed to and provisioned for voice mail).

Tip: The maximum number of ordered lists and phone numbers in each list is restricted by your service package.

Your calls are routed differently based on who is calling you. Based on your ordered lists, incoming calls can be forwarded, or routed, to any number of devices or clients. You can “push” a web page in response to an incoming call, as well as send a response in the form of an instant message.

Specifying an ordered list

To specify an ordered list for your incoming calls

1 Select the option to ring your devices in an ordered list.

Note: The options that will be available to the user in this window will vary based on the service provider package selected by your service provider.

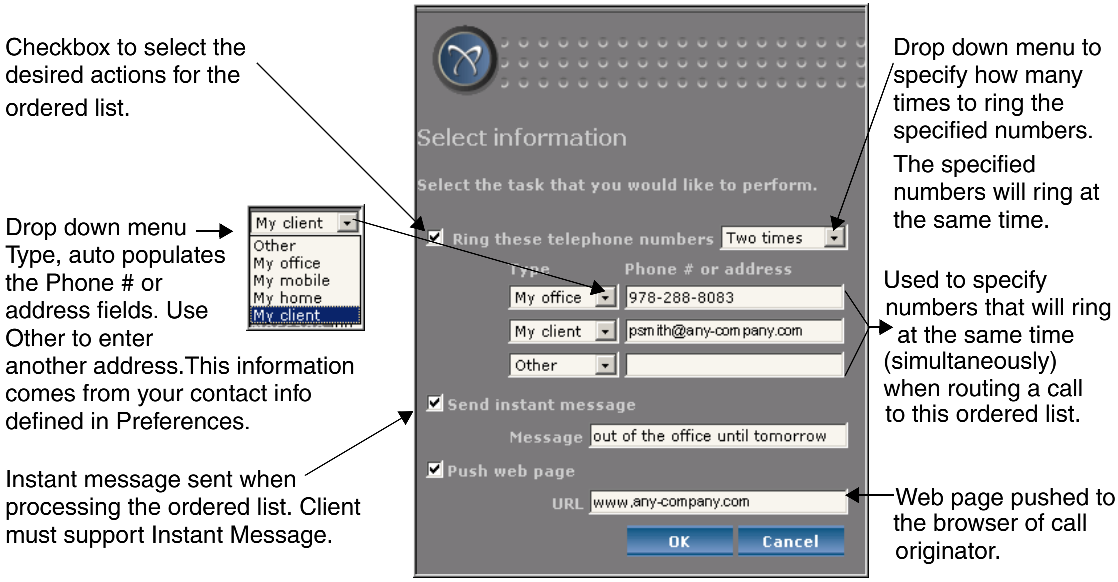
Note: The number of "ordered lists" grows depending on the Advanced Screening service parameters in your service package. If you have Voicemail enabled in your service package, there will be an additional option for "If no answer then send to voicemail" when creating an ordered list.

Note: If you do not have Voicemail enabled, then the Personal Agent Route Wizard does not provide the ability to create a route that terminates a call to voice mail. However, if Voicemail is enabled, and the Advanced Screening service is not assigned to your service package, then only the default route is available to you.

---

2 Enter a check mark in the first option box in the list. Click the **THESE NUMBERS** link to specify a list of numbers that will be rung when the

incoming call reaches a ringlist. A window appears that allows you to select any, or all, of the following actions for the incoming call.



3 Select the actions for the incoming call, and click **OK,** to return to the Actions page.

4 Continue specifying ordered lists. To edit the ordered list, click the links in the Route details window.

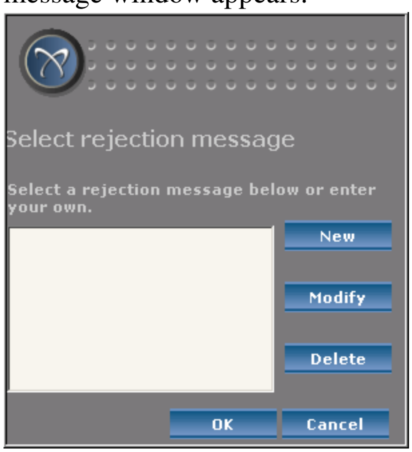
5 If you are finished specifying conditions, click **Finish** to name your route and save your route details. If you wish to specify exceptions, click **Next**.

Specifying a rejection message

To specify a reject message

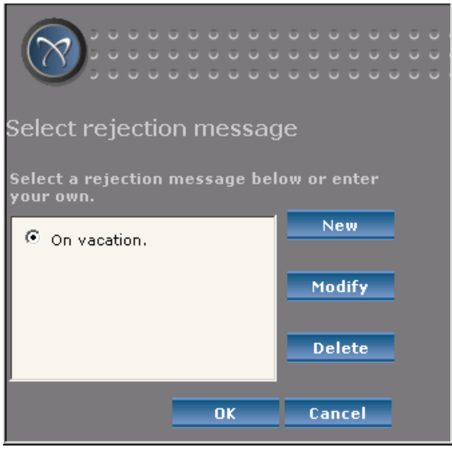
1 Select the Rejection option in the window that specifies how you would like to filter calls received.

2 Click the **MESSAGE** link to compose a message to display when the route is activated for an incoming call from an anonymous caller. The Select rejection message window appears.



3 To compose a rejection message, click **New** a dialog box will open. Enter the text for your message in the dialog box and Click **OK** on the dialog box. The

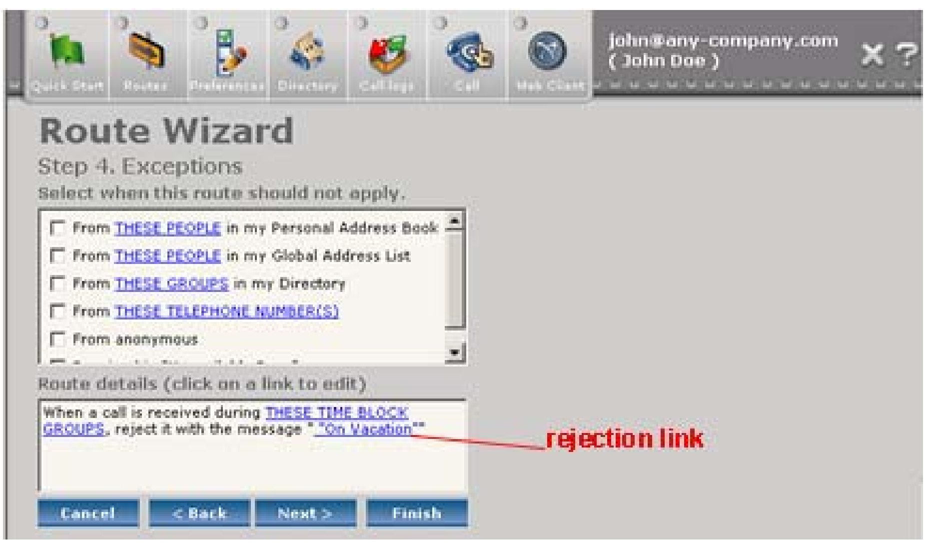
rejection message now appears in the Select rejection message window. Click on the circle beside the rejection message to make it active.



4 Click **OK** to return to the Route wizard. Your reject reason appears in the Route details window.

5 To edit the message, click the rejection link in the Route details window.

6 Continue to specify conditions, or click **Next**, to go to the next step.



Specifying an email request

To specify an email request when you receive an incoming call, select the option to request an email (PSTN callers will receive a busy tone).

With this option, the caller is asked to send an email to the email address of the user that they called. An email window opens up, with the email address autofilled with the address of the person requesting an email. The phone is never rung.

Step 4: Exceptions

Step 4 of the route wizard allows you to specify exceptions to the conditions that you specified in Step 2: Conditions. The method for specifying exceptions is consistent with the method for specifying conditions. See “Step 2: Specifying conditions” on page 91 for information on specifying conditions.

The following links are available as exceptions

- **THESE PEOPLE** (in your personal address book)
- **THESE PEOPLE** (in the global address book)
- **THESE GROUPS** (in your directory)
- **THESE TELEPHONE NUMBER(S)**
- From anonymous
- Received in “Unavailable Busy”

Tip: The **SPECIFIC DAY/TIME RANGE(S)** link is not available as an exception.

The Received from “Unavailable Busy” parameter is only available if you have Presence Based Routing enabled in your service package.

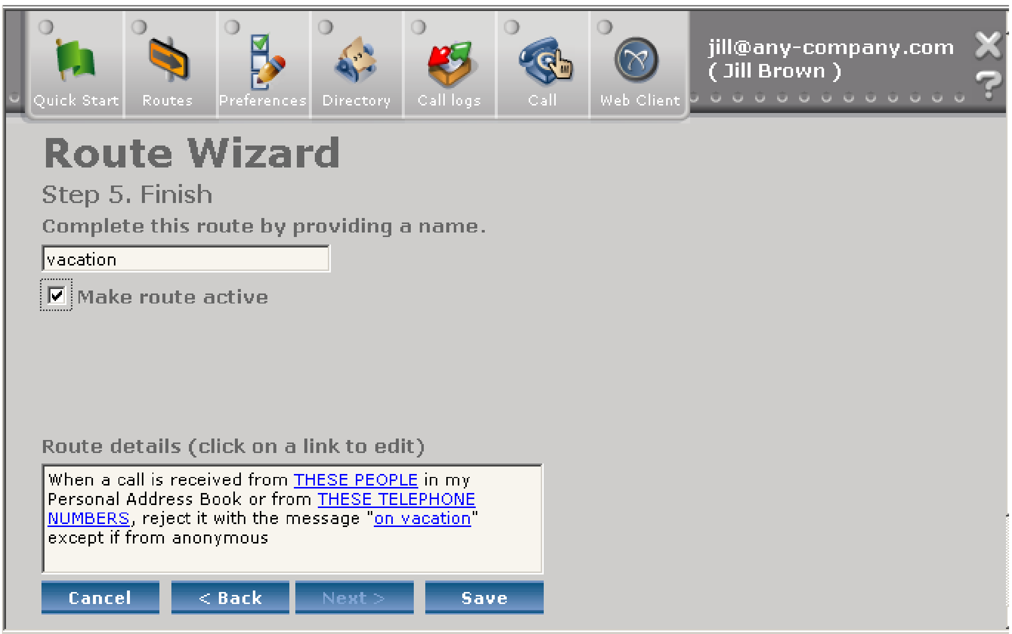
To edit the condition, click the link in the Route details window. To go to the next step, click **Next**.

Step 5: Finish

Before you complete the final step in setting up your route, it is recommended that you view all the route details to ensure that you are satisfied with the conditions, actions, and exceptions.

If the route is complete, you can now name the route and set the route to active.

1 Specify a unique name for the route in the text box provided.



2 Select the checkbox, Make this route active.

3 Click **Save,** to save the route information and activate the route. Incoming calls will now be processed according to your active route(s).

Appendix A
Address Book Search Criteria

Topics in this section:

- "Personal Address Book search criteria" on page 112
- "Global Address Book search criteria" on page 114

Note: The only field that is case sensitive is the phone number field. This field is case sensitive for the entire string. All other fields are case insensitive for the entire string.

Note: Name searches automatically search for "sounds like" and "fuzzy (similar spelling)" an example of this feature would be the spelling of the word elephant or elefant. However please note if a user updates their first or last name they will not be found by the "fuzzy" search until the next day.

Tip: To **remove** the" sounds like" and "fuzzy" search options include the * symbol in the name search.

Personal Address Book search criteria

The following table provides a detailed description of the Personal Address Book search criteria.

Field	Example Each criteria	Results
Nickname	*nick	Returns entries ending with nick, and starting with anything (appends *).
	nick	Same as *nick.
	nick	Finds anything that starts with nick (appends *).
	nick*	Same as nick.
Name	name	Returns anything starting with first name and starting with last name (appends * to both).
	name*	Same as "name".
	*name	Returns anything that has first name or last name that contains name (appends * at end).
	name	Same as *name.
	firstname lastname	Returns anything starting with last name and starting with first name (appends * to both).
	firstname* lastname*	Same as "firstname lastname".
	firstname* lastname	Same as "firstname lastname".
	firstname lastname*	Same as "firstname lastname".
	lastname, firstname	Returns anything starting with last name and starting with first name (appends * to both).
	lastname*,firstname	Same as "lastname firstname".
	lastname, firstname*	Same as "lastname firstname".
	lastname*, firstname*	Same as "lastname firstname".
	lastname*,*firstname	Returns entries starting with last name and containing firstname in the firstname (appends * to the firstname).
	lastname*,*firstname*	Same as "lastname*,*firstname".

Field	**Example Each criteria**	**Results**
	*lastname, firstname	Returns entries containing last name and starting with firstname (appends * to the firstname).
	lastname, firstname	Same as *lastname, firstname.
Last name (	*lastname	Returns entries containing lastname (appends *).
	lastname	Same as *lastname.
	lastname*	Returns entries starting with lastname.
	lastname	Same as lastname*.
First Name	*firstname	Returns entries containing firstname (appends *).
	firstname	Same as *firstname.
	firstname*	Returns entries starting with firstname.
	firstname	same as firstname*.
Phone Number	phoneNumber	Returns entries starting with phoneNumber (appends *).
	phoneNumber*	Same as phoneNumber.
SIP Address	*sipAddress	Returns entries containing sipAddress.
	sipAddress*	Same as *sipAddress.
	sipAddress*	Returns entries starting with sipAddress.
	sipAddress	Same as sipAddress*.
Friends	Rules similar to the last name and first name search apply to this search criteria, but the search is carried out for the string with the condition that the entry being searched for is a Friend.	
Group	*groupName	Returns entries belonging to group containing groupName in the name of the group (appends *).
	groupName	Same as *groupName
	groupName	Finds entries belonging to the group starting with groupName (appends *).
	groupName*	Same as groupName.
no criteria		Returns all the entries in the address book.

Global Address Book search criteria

The following table provides a detailed description of the Global Address Book search criteria

Note: The only field that is case sensitive is the phone number field. This field is case sensitive for the entire string. All other fields are case insensitive for the entire string.

Note: Name searches automatically search for "sounds like" and "fuzzy (similar spelling)" an example of this feature would be the spelling of the word elephant or elefant. However please note if a user updates their first or last name they will not be found by the "fuzzy" search until the next day.

Tip: To **remove** the" sounds like" and "fuzzy" search options include the * symbol in the name search.

Field	Example search criteria	Results
Username	user@domain*	Returns entries which have username starting with user@domain.
	user@domain	Same as user@domain*.
	user*	Returns entries which have username starting with user.
	user	Returns entries containing user in the username.
Name	name	Returns anything with first name or last name starting with name (appends * at end).
	name*	Same as "name".
	*name	Returns anything that has first name or last name that contains name (appends * at end).
	name	Same as *name.

Field	**Example search criteria**	**Results**
	"name"	Returns all users that have the last name or first name that match the search criteria within the quotation marks.
Name	firstname lastname	Returns anything starting with first name and starting with last name (appends * to both).
	firstname* lastname*	Same as "firstname lastname".
	firstname* lastname	Same as "firstname lastname".
	firstname lastname*	Same as "firstname lastname".
	lastname, firstname	Returns anything starting with last name and starting with first name (appends * to both).
	lastname*,firstname	Same as "lastname firstname".
	lastname, firstname*	Same as "lastname firstname".
	lastname*, firstname*	Same as "lastname firstname".
	lastname*,*firstname	Returns entries starting with last name and containing firstname in the firstname (appends * to the firstname).
	lastname, firstname	Same as *lastname, firstname.
Last name	*lastname	Returns entries containing lastname (appends *).
	lastname	Same as *lastname.
	lastname*	Returns entries starting with lastname.
	lastname	Same as lastname*.
First Name	*firstname	Returns entries containing firstname (appends *).
	firstname	Same as *firstname.
	firstname*	Returns entries starting with firstname.
	firstname	Same as firstname*.
Phone Number	phoneNumber	Returns entries starting with phoneNumber (appends *).
	phoneNumber*	Same as phoneNumber.

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